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Executive Agency for Small and Medium-sized Enterprises (EASME)

Department A – COSME, H2020 SMEs and EMFF
Unit A1 – COSME

CALL FOR TENDERS

New technologies and digitisation: opportunities and challenges for the social economy and social enterprises

EASME/COSME/2017/024

TENDER SPECIFICATIONS

Open Procedure

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1. TECHNICAL SPECIFICATIONS

1.1. INTRODUCTION

The Executive Agency for Small and Medium-sized Enterprises (henceforth "EASME" or "the Contracting Authority")[1], acting under the powers delegated by the European Commission (referred to also as "the Commission"), is launching this invitation to tender for **"*New technologies and digitisation: opportunities and challenges for the social economy & social enterprises*".**

The present call for tenders is based on Regulation (EU) no 1287/2013 of the European Parliament and of the Council of 11 December 2013 establishing a Programme for the Competitiveness of the Enterprises and small and medium-sized enterprises (hereafter "COSME")[2] (2014-2020) and repealing Decision No 1639/2006/EC. More particularly, it is based on Commission Implementing Decision of 6 July 2017 on amending the Commission Implementing Decision C(2017) 1042 concerning the adoption of the work programme for 2017 and the financing for the implementation of the Programme for the Competitiveness of enterprises and small and medium-sized enterprises[3] and its Annex. It is foreseen under item "**GRO/SME/17/D/03 – Social Business Initiative: digitisation/ collaborative economy and social enterprise – promoting social considerations into public procurement, Lot °1. Digitisation, collaborative economy and social enterprises".**

This service contract is a follow up of the workshop[4] that was prepared jointly by the European Economic and Social Committee (EESC) and the Commission and held on 12 May 2017 on the "*New technologies and digitalization: opportunities and challenges for Social Economy and Social Enterprise*".

1.2. BACKGROUND INFORMATION AND CONTEXT

Digital technologies: a key asset for Europe

European societies are transforming rapidly due to technological change. Trends, such as, digitalisation and automation are changing the way we live and work faster than ever before, reshaping the labour market and the wider economy in fundamental ways.
Indeed, technologies are bringing about some important structural changes in the way in which individuals and organizations interact by proposing a wide range of innovative opportunities, many of which tackle different societal challenges.

The transition towards a digital economy is crucial for the competitiveness of the economy and for growth and a job-rich growth recovery.

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[1] EASME was set up by Commission Implementing Decision (2013/771/EU) of 17 December 2013 establishing the "Executive Agency for Small and Medium-sized enterprises" and repealing Decisions 2004/20/EC and 2007/372/EC (OJ L 341 of 18.12.2013). EASME replaces and supersedes former Executive Agency for Competitiveness and Innovation (EACI).

[2] COSME is the EU programme for the Competitiveness of Enterprises and Small and Medium-sized Enterprises (SMEs) running from 2014 to 2020 with a planned budget of €2.3bn. Regulation (EU) No 1287/2013 of 11 December 2013, Official Journal of the European Union 2013/L 347/33

[3] See on page 95. GRO/SME/17/D/03 - Social Business Initiative: digitisation/ collaborative economy and social enterprise – promoting social considerations into public procurement. Lot n°1. Digitisation, collaborative economy and social enterprises. http://ec.europa.eu/research/participants/data/ref/other_eu_prog/cosme/wp/cosme-wp-2017_en.pdf

[4] For more details please see: http://www.eesc.europa.eu/?i=portal.en.events-and-activities-new-tech-and-digit

Today, there is an intense debate at both European and national level on the digitalisation of the economy, characterized by new technologies, such as, 'blockchain', 'big data analytics', 'internet platforms', 'cloud computing', 'machine learning', as well as, broader systemic phenomena, such as, 'Internet of Things' and especially, the 'collaborative economy', which in turn brings to mind further relevant trends to be carefully considered (the so-called 'uberisation' is probably the more popular one).

The European Commission has released different documents underlying the fact that Europe needs to open up digital opportunities for people and business in order to strengthen its competitiveness.

The European Commission recognises that the **Digital Single Market[5] (DSM)** and the emergence of new technologies can create opportunities for new start-ups and existing companies in a market of over 500 million people. Completing a Digital Single Market could contribute €415 billion per year to the European economy, create jobs and transform the delivery of public services. An inclusive DSM also offers opportunities for citizens provided they are equipped with the right digital skills. Enhanced use of digital technologies can develop citizens' access to information and culture, improve their job opportunities and empower them individually and by harnessing the immeasurable potential of networks. It also opens doors for government and governance, allowing for new means of participation and policy co-design.

The European Commission adopted a **"European strategy for Key Enabling Technologies – A bridge to growth and jobs**"[6] (2012) outlining the strategy to boost the deployment of key enabling technologies (KETs). EU Member States (MS) launched major national initiatives[7], notably, in Germany, Estonia, Italy, France and the United Kingdom (UK). The European Commission's Communication for a **"European Industrial Renaissance"**[8] (2014) stated that digital technologies are essential to increase productivity through redefining business models and creating new products and services.

The European Commission created a **Strategic Policy Forum on Digital Entrepreneurship**[9] in 2014. It delivered several reports, including: “Accelerating the digital transformation of European industry and enterprises”[10] (March 2016) and “Upskilling European industry: New operational tools wanted”[11] (July 2016). The European Commission adopted a "Digital Single Market Strategy for Europe"[12] (May 2015) and a Communication on "Digitising European Industry: Reaping the full benefits of a Digital Single Market"[13] (April 2016).

Upgrading skills

The European Commission adopted in 2007 a Communication[14] on **"e-Skills for the 21st Century**: **fostering Competitiveness, Growth and Jobs**" which included a long-term EU e-skills strategy focusing on IT practitioners[15] and IT professionalism[16]. Good progress was made and efforts needed to be intensified. This was recognised at the European Union (EU) level, in particular, by

[5] https://ec.europa.eu/digital-single-market/en/digital-single-market

[6] https://ec.europa.eu/growth/industry/key-enabling-technologies/european-strategy_en

[7] DE: www.hightech-strategie.de/de/The-new-High-Tech-Strategy-390.php; IT:www.fabbricadelfuturo-fdf.it/?lang=en; FR:www.economie.gouv.fr/files/files/PDF/pk_industry-of-future.pdf and UK: www.catapult.org.uk/

[8] https://ec.europa.eu/growth/industry/policy/renaissance_en

[9] http://ec.europa.eu/growth/sectors/digital-economy/entrepreneurship/strategic-policy-forum_en, It includes "*Blueprint on cities and regions*"; "*Digital compass for decision makers*" and "*Upskilling industry*"

[10] http://ec.europa.eu/DocsRoom/documents/15856/

[11] http://ec.europa.eu/DocsRoom/documents/17926

[12] http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52015DC0192

[13] http://eur-lex.europa.eu/legal-content/en/TXT/?uri=CELEX%3A52016DC0180

[14] http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52007DC0496&from=EN

[15] See EUROSTAT statistics on hard-to-fill vacancies in enterprises (data extracted in November 2015): http://ec.europa.eu/eurostat/statistics-explained/index.php/ICT_specialists_-_statistics_on_hard-to-fill_vacancies_in_enterprises

[16] EU efforts on IT professionalism are building on the European e-Competence Framework (e-CF) which has been published in 2016 as a standard by CEN/TC 428 (e-Competences and IT Professionalism).

the launch of the "Grand Coalition for Digital Jobs"[17] (2013) and of the "e-Skills for Jobs" campaign[18] (2014-2016). Further information and reports are available on the Europa website[19].

The European Commission adopted a **"New Skills Agenda for Europe"**[20] on 10 June 2016 calling on EU Member States and stakeholders to improve the quality of skills and their relevance for the labour market. Key measures include a Blueprint for Sectoral Cooperation on Skills and a Digital Skills and Jobs Coalition. The Blueprint will help mobilise and coordinate key players, encourage private investment and promote more strategic use of relevant EU and national funding programmes. Sectoral skills partnerships[21] will be set up at EU level and then rolled out at national or regional level. It will be piloted in six sectors: automotive, maritime technology, space, defence, textile and tourism. Additional areas (construction, steel, health, green technologies and renewable energies) will be assessed in a second wave starting as of 2017. The Coalition will seek to develop a large digital talent pool and ensure that the labour force is equipped with digital skills. Member States are invited to develop national digital skills strategies by mid-2017 on the basis of targets set by end-2016. The European Commission will bring together Member States and stakeholders to pledge action and to share best practices.

Digitalisation and technologies for the common good

Fast-paced and all-encompassing technological changes always disrupt traditional ways of doing things and bring new concerns and questions. Many citizens consider that using online technologies to foster global labor markets and value chains seems to encourage a race to the bottom for wages and working conditions, transferring the risk and responsibility from employers to workers. Moreover, new technologies tend to favour particular skills, while devaluating other skills and making them redundant.

Digital businesses, creative industries, high-tech manufacturing, and knowledge-intensive services are creating increasing value for the economy, driving and taking advantage of technological change. Low-tech, labor-intensive manufacturing and routine jobs in the service sector are at high risk of disruption.

A gap is growing between the people possessing the skills and opportunities to take advantage of this transformation and those who do not. Rising income inequality reflects this trend; with increasing profits going to fewer beneficiaries, and being counterbalanced by wage stagnation or job cuts.

However, there are many examples from the past where new technologies reduced inequality, by making goods and services accessible for large parts of the population, including the bottom of the pyramid (BOP).

At a first glance, it seems that the values stemming from the digital economy are not compatible with the ones endorsed by the social economy.

Nevertheless, and according to recent studies carried out by the Joint Research Centre of the European Commission, digitalisation and new technologies should however be seen as

[17] See: http://europa.eu/rapid/press-release_SPEECH-13-182_en.htm
[18] See: http://eskills4jobs.ec.europa.eu/
[19] Digital skills, see: http://ec.europa.eu/growth/sectors/digital-economy/e-skills/index_en.htm and https://ec.europa.eu/digital-single-market/en/skills-jobs. Key Enabling Technologies and KETs skills, see: http://ec.europa.eu/growth/industry/key-enabling-technologies_en. Digital Skills and Jobs Coalition, see: https://ec.europa.eu/digital-single-market/en/news/digital-skills-core-new-skills-agenda-europe and http://ec.europa.eu/digital-agenda/en/grand-coalition-digital-jobs-0. Strategic Policy Forum on Digital Entrepreneurship, see: http://ec.europa.eu/growth/sectors/digital-economy/entrepreneurship/strategic-policy-forum/index_en.htm
[20] See: http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A52016DC0381
[21] This includes developing sectoral strategies for the next 5-10 years, identifying skills needs and developing solutions (such as joint development of higher VET opportunities and business-education-research partnerships; and supporting agreements on the recognition of sectoral qualifications and certifications) etc.

opportunities for the social economy and social enterprises[22]. There are many examples from the past where new technologies reduced inequality, by making goods and services accessible for large parts of the population. Evidence gathered show that a crucial contribution to the implementation of the Social Investment Package has been given by the social economy and social enterprises in many EU Member States. Social enterprises' initiatives, especially those in which Information and Communication Technologies (ICTs) play an important role, contribute to several policy objectives, such as, implementing active inclusion strategies or modernizing social protection systems[23].

The social economy and social enterprises have to make the most out of the digitalisation as a means to fostering a fairer economy and a resilient society. To unlock (and fine-tune) the growth potential of both the digital single market and the social economy, there is a need to recognise not just how social economy actors could use the digital economy, but also to ensure that social economy actors can participate in the Digital Single Market and help shape the ways in which it functions.

New business models, often start-ups, can for instance be created[24]. These start-ups can assist and address these societal challenges that drive systemic changes, increase scale and/or impact and multiply positive results by constructing fairer markets. They can be economic actors of change promoting decent employment, defending worker rights, constructing collaborative actions for better social outcomes and helping Europe to transform into "a smart, sustainable and inclusive economy, delivering high levels of employment, productivity and social cohesion".

If appropriately structured with social economy values, such as, fairness, participation and solidarity, the use of digitalisation and new technologies can help protect Europe's economic and social model and increase citizens' well-being. It can also become a key component for the renewal of public services currently under high budgetary pressures. By supporting higher levels of e-readiness and e-skills, as well as, education levels, digitalised tools can ensure that all Europeans can take part in the future knowledge society[25].

The development of digital technologies constitutes a means for the creation of local networks and for the development of other face to face, conventional, social and productive activities. As shown by Misuraca et al (2016), ICTs facilitate processes of co-creation and co-production between different stakeholders, especially in those fields in which social inclusion of many underprivileged categories is a growing need (long term unemployed, homeless people, etc.). Moreover, ICTs have been found playing a crucial role in the integration processes across sectors, thus unleashing the potential of the social economy in support of the broader institutional environment.

Therefore, the opportunities and challenges to create synergies between digitalisation, new technologies and social economy actors are manifold and should be thoroughly examined and addressed. Social economy and social enterprises must use digitalisation and digital technologies as a lever of economic and social transformation to increase social impact across Europe. These actors have to adapt and react to make the utmost of the current digital phenomena therefore transforming a challenge into an opportunity.

At the same time, the increasing availability of technology at lower prices, affects some specific needs of the social enterprises, especially in terms of funding and management capabilities. The spread in the use of ICTs in the social economy means that, although social enterprises were previously mainly conceived and run as labour-intensive ventures, nowadays social enterprises

[22] Misuraca, G., Lipparini, F., Kucsera, C.; The role of the social economy, JRC Insights – Social Policy Innovation Series, Issue 1, 2016

[23] Misuraca, G., Kucsera, C., Lipparini, F., Voigt, C., Radescu, R.; *'ICT-Enabled Social Innovation to support the Implementation of the Social Investment Package - Mapping and Analysis of ICT-enabled Social Innovation initiatives promoting social investment in integrated approaches to the provision of social services: IESI Knowledge Map 2015'*

[24] https://ec.europa.eu/digital-single-market/en/news/new-initiative-startups-start-and-scale-europe

[25] https://ec.europa.eu/digital-single-market/en/skills-jobs

are becoming more capital-intensive. This prompts an in-depth examination of some issues, such as for instance access to finance, new funding schemes and public procurement procedures that might be used as a demand-side tool to stimulate the growth of the social economy and social enterprises[26].

1.3. GENERAL AND SPECIFIC OBJECTIVES

EASME wishes to enter into a service contract.

The goal is to study, benchmark, diffuse initiatives (private or public)/policies on the global, European/national level with a view to promote successful approaches to social economy and social enterprises in order to:

- Reinforce their e- skills and the uptake of new technologies in their entrepreneurial strategy;
- Discuss opportunities and challenges they face in that field;
- Diffuse best practices targeting both private and public stakeholders.

The target groups are professionals, managers, leaders and entrepreneurs in the field of social economy (including start-ups and scale-ups), as well as, public policy makers at different level of governance.

The main results expected are the following:

- ✓ Getting a better understanding of the ways in which policies and initiatives supporting the digitalisation and the uptake of new technologies for social economy and social enterprises can be designed at EU and national levels;
- ✓ Helping the EU and Member States in designing and implementing policies and measures for the promotion of those measures;
- ✓ Encouraging the uptake of innovative technologies for the social economy and social enterprises;
- ✓ Exchanging ideas and practices on how new technologies inspire the social economy and how can such technologies can be inspired by the social economy's practices;
- ✓ Facilitating the identification, the promotion and the uptake of best practices;

The final report must constitute a contribution to the efforts of the European Commission and Member States towards establishing policy recommendations in the field of improving digitalisation and uptake of new technologies for the social economy and social enterprises.

The tenderers are expected to propose in their tenders an innovative and relevant methodology with coherent and well-identified tasks to address all these requirements.

1.4. TASKS AND GEOGRAPHICAL SCOPE

1.4.1. *Tasks*

The contractor will be asked to implement the tasks grouped under **four work packages (WP).** The work packages include:

Work package 1 (WP 1): State of play, challenges and opportunities

Work package 2 (WP 2): Digital platforms: cooperativism and collaboration

Work package 3 (WP 3): Open-source technologies/disruptive technologies and their role for the social economy and social enterprises

[26] Misuraca, G., Kucsera C., Pasi, G., Gagliardi, D., Abadie, F., *Mapping and Analysis of ICT-enabled Social Innovation initiatives promoting social investment across the EU: IESI Knowledge Map 2016*

Work package 4 (WP 4): Role and influence of public policies in shaping an e-environment for social economy and social enterprises

For details on each work package please see section 1.6 below.

All four work packages will be composed of analysis of the latest information and data based on desk research, online surveys, or interviews with different public and private stakeholders. The contractor is invited to focus on documenting best practices, elaborating recommendations and proposing concrete supporting measures, as well.

The final report must provide a solid basis for possible future actions at EU and national levels in this field.

A supervisory team will be set up composed of civil servants from EASME and the Commission, to guide the work under the contract and provide advice. The team will meet in Brussels with the contractor and provide guidance during the course of the work. The meetings will take place in Brussels either at EASME's premises or at the European Commission's premises (DG for Internal Market, Industry, Entrepreneurship and SMEs – DG GROW). Other relevant services may be invited to these meetings and will be regularly informed of the progress of the work and its results. Each of these meetings will last for half a day maximum.

The supervisory team and the contractor will gather three times:

- For a **kick-off meeting,** within 2 weeks of the signature of the contract. During the **kick-off meeting**, the supervisory team and the contractor shall go through the work plan and may agree on a more detailed timetable. Two weeks after the meeting the contractor shall deliver an inception report in a form specified in Section 1.10.

- For a **mid-course of the work meeting,** within 7 months of the signature of the contract. During that **meeting** it should present the drafts of the interim report and the structure of the brochure. These deliverables will be discussed during the meeting.

- For a **final meeting,** within 11 months of the signature of the contract. During the **meeting,** the contractor will present the draft final report as well as the drafts of the brochure and of the executive summary. These deliverables, as well as the overall progress sin the project, will be discussed during the meeting.

The contractor, represented by its project manager and, in case of a joint tender, at least one representative from each partner must be present at those meetings.

Languages

The working language for this service contract will be English. All reports, final, draft and working documents, the executive summaries and the brochure shall be delivered in English. In addition, the executive summary and brochure (drafts and final versions) should be also delivered in French and German.

1.4.2. *Geographical scope of the tasks*

The services to be delivered should cover at least 3 countries amongst the 28 EU Member States.

1.5. Input by the Contracting Authority

Not applicable

1.6. GENERAL GUIDANCE ON METHODOLOGY

The tenderers must propose in their bids an innovative and relevant methodology with coherent and well identified tasks, costs and efforts to address all the requirements.

The objective of the work will be to collect information regarding the linkages observed between digital technologies and the social economy/social enterprises in several EU MS (the choice of the MS should be justified by the tenderer in its offer; given the goal of this project it is expected that the countries with good record of practices in that field will be proposed) and the generation of analysis, insights and recommendations through various means, including desk research, fact-finding missions and broad consultations with public and private stakeholders involved in the field of digitalisation and new technology and its relations with the social economy and social enterprises.

The goal is to help the Commission and Member States, at different level of governance, to design adequate policy recommendations for social economy and social enterprises to make the best use of the digital technologies.

WP 1: State of play, challenges and opportunities

The first part of the Final report to be produced should focus on the state of play, the challenges and the opportunities that arise from the phenomenon of digitisation and use of new technologies for the social economy and social enterprises.

On the one hand, several studies demonstrate that many actors working in the social economy seem to lack digital skills and ICTs management capability. With the right skills and an improved capability of managing ICTs, actors of the social economy would be equipped for better-quality jobs and better impacts, thus improving their capacity to respond in a more effective manner to societal challenges. Consequently, acquiring proficiency in digital skills and digital literacy is key for individuals[27], while for social enterprises identifying the contextual factors that enable digital capacity-building[28] is key, as well.

On the other hand, many social entrepreneurs, especially young people, estimate that technology has levelled the playing field, opening up remarkable opportunities. For many of these emerging digital entrepreneurs, the primary objective is to make the world a better place and have a social impact[29].

By presenting examples selected in different Member States, the contractor will have to demonstrate how actors in the social economy are facing and responding to the digitalisation process and the trends that compose it, highlighting challenges and opportunities that new technologies can offer to them.

The contractor will be asked to reflect on the following issues:

- How do new technologies impact actors of the social economy and social enterprises in their daily practices and procedures? What are these actors' digital needs in terms of production, management and participatory governance?

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[27] http://data.consilium.europa.eu/doc/document/ST-13766-2015-INIT/en/pdf

[28] Joint Research Centre (JRC) developed several Competence Frameworks, and among these at least the two on, respectively, entrepreneurship and digital skills might be considered as reference points on the topic. See: Bacigalupo, M., Kampylis, P., Punie, Y., Van den Brande, G. (2016). EntreComp: The Entrepreneur-ship Competence Framework. Luxembourg: Publication Office of the European Union; Vuorikari, R., Punie, Y., Carretero Gomez S., Van den Brande, G. (2016). DigComp 2.0: The Digital Competence Framework for Citizens. Update Phase 1: The Conceptual Reference Model. Luxembourg Publication Office of the European Union

[29] In the UK, according to a Populus survey, more than a quarter of 16- to 25-year-olds want to set up their own business with a strong social purpose, and 14% are in the process of doing so, compared with 8% only a year ago.

- How can one understand divergent attitudes in that area between traditional actors of the social economy and social entrepreneurs eager for change and disruption?
- How can new technologies allow all actors of the social economy to improve? How can actors take ownership of these technologies and better respond to the needs of citizens?
- How does digitalisation fit in the socio-economic narrative endorsed by the social economy and social entrepreneurs?
- How can actors of the social economy and social enterprises use digital tools to push for a more inclusive economy? What are the consequences on working arrangements, on value distribution and on the invention of new transformative practices?

WP 2: Digital platforms: cooperativism and collaboration

Online platforms have dramatically changed the digital economy over the last two decades and are omnipresent in today's digital society. They play a prominent role in the creation of 'digital value' which forms an essential part of future economic growth in the EU. They consequently are of major importance to the effective functioning of the digital single market.

In a Communication setting out a strategy for the digital single market[30], the Commission committed to undertake a comprehensive assessment of the role of platforms, including in the sharing economy, and of online intermediaries. The objective of the Communication on Online Platforms[31] that was released in December 2016 was twofold:

1. To outline the key issues identified in the assessment of online platforms;
2. To present the Commission's position on both the innovation opportunities and the regulatory challenges presented by online platforms, and to set out its approach to supporting their further development in Europe.

However the costs and benefits associated with online platforms, such peer-to peer (P2P) sharing platforms or business-to-consumer (B2C) platforms depend on the business models in place.

For people who participate in commons, peer productions or co-operatives, the emerging economy constitutes a frustrating paradox insofar as there exists a mismatch between the cooperative culture on the one hand and the organizational forms that can sustain it and advance the general well-being of society[32] on the other.

One needs to stress that many online platforms, such as sharing/collaborative platforms, allow for instance the shared use of assets, but not for the shared ownership of the platforms. The valorisation of the social economy model of governance and its promotion among the new-businesses taking advantage of the Digital Single Market would help mitigate some negative effects such as working conditions.

Platform cooperatives[33] seem to be an alternative to venture capital funded platforms insofar as they are owned and governed by those who make effective use of them—workers, users, and other relevant stakeholders. Proponents of platform cooperativism claim, by ensuring that the

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[30] See footnote 2

[31] https://ec.europa.eu/digital-single-market/en/news/communication-online-platforms-and-digital-single-market-opportunities-and-challenges-europe

[32] See *"Towards an open co-operativism: a new social economy based on open platforms, co-operative models and the commons"* – Supported by the Böll Foundation with the assistance from Charles Leopold Mayer Foundation.

[33] http://www.shareable.net/blog/11-platform-cooperatives-creating-a-real-sharing-economy

financial and social value of a platform circulates among these participants, platform cooperatives are able to bring about a more equitable and fair digitally-mediated economy in contrast with the extractive models endorsed by corporate intermediaries.

Platform cooperatives differ from traditional cooperatives not only due to their use of digital technologies, but also by their contribution to the commons for the purpose of fostering an equitable social and economic landscape.

The contractor will be asked to reflect on the following questions:

- How can the future of cooperative platforms foster territorial cohesion and how can collaborative models be envisioned?
- How to better frame and regulate platform coops?
- How can we diffuse an entrepreneurial model which would simultaneously generate economic value while prioritising employment and good working conditions?
- What are the future prospects for the cooperative platform economy?
- What are the interactions between social economy actors on the one hand and the digital collaborative economy on the other?

WP 3: Open-source technologies/disruptive technologies and their role for the social economy and social enterprises

The **open-source model**[34] is a decentralized development model that encourages open collaboration. A main principle of open-source software development is peer production, with products such as source code, blueprints, and documentation freely available to the public.

The open technology and open-software movement is gaining momentum and suggests a paradigm shift in paradigm that shakes the traditional ways of doing things.

In this perspective, the movement for open technology and free software is growing and gradually leading to the emergence of a new model. The cooperation of users and developers is opening the way to initiatives centred on the response to needs. The ties between social and technological innovations seem natural, but still need to be developed.

Blockchain technologies[35] are for instance a decentralized information storage technology that records all transactions in a large dataset automatically distributed and shared by everyone on the network. The block chain technology offers an opportunity to overhaul the universe of transactions (finance, trade, civic participation, etc.), the records environment (notary, official registers, citizenship, etc.), or to use smart contracts.

Disruptive technologies[36] are technological innovations that ultimately replace a dominant technology in a market or in society. The disappearance of the dominant technology will take place even if the disruptive technology is very different and often less effective initially, according to conventional criteria. For example, photo film technology (Kodak) has been replaced by digital photography, cassettes and CDs have been replaced by the MP3 digital format, and the indexing of Internet websites by portals (Yahoo) has been superseded by search engines with automated algorithms (Google). In addition, we may speak of "disruptive innovation" because it is the use of technologies that enables the generation of new products and services.

[34] https://en.wikipedia.org/wiki/Open-source_model
[35] *"How blockchain technologies could changes our lives"* http://www.europarl.europa.eu/RegData/etudes/IDAN/2017/581948/EPRS_IDA%282017%29581948_EN.pdf
[36] https://en.wikipedia.org/wiki/Disruptive_innovation

All these new technologies are rapidly changing the environment in which the social economy and social enterprises operate. They enable social enterprises to move beyond their local geographic area and generate greater impact by scaling easily replicable activities with lower unit costs in traditionally under-served areas. Social enterprises can also leverage new technologies to rethink and disrupt conventional business models, thus creating both opportunities and challenges.

The contractor will be asked to reflect on the following questions:

- In what ways can new technologies (such as, distributed ledger technology for instance blockchains), fabrication laboratories (FabLabs) data mining or geolocation, just name some of them, lead to innovations for social economy and social enterprises?
- In what way and under what conditions open technology/disruptive technologies can bring about new uses for the social economy?
- And conversely, how can these technologies draw inspiration from practices of the social economy?
- In what sense and under which conditions can social enterprises exploit open source technologies/disruptive technologies so as to develop new uses and practices?

WP 4: Role and influence of public policies in shaping an e-environment for social economy and social enterprises

Digital transformation and technological advances are giving rise to disruptive business models, which are drastically challenging the current regulatory environment. It is therefore necessary for policy makers at different levels of governance to be fully involved in the issues at stake in order to shape an e- environment that can benefit the social economy and social enterprises.

To begin, by supporting higher levels of e-readiness and e-skills, as well as education levels, public authorities can help different actors in the social economy to fully use the digital single market and can ensure that they are all part of the future knowledge society.

Digital inclusion efforts should therefore ensure that all these actors can contribute to and benefit from the digital economy and society.

There is also a necessity for public authorities to understand the regulatory implications of each disruptive technology as well as the impact on jobs, on existing business and on the creation of new businesses. Key drivers and obstacles to creating an e-environment favourable to the social economy and social enterprises need to be identified by policy makers in order to formulate policy recommendations.

Close cooperation between different stakeholders towards elaborating public policies could therefore be envisaged. The co-production and co-construction of public policies could be one element of this cooperation. It should imply the participation of social economy actors in designing and implementing public policies. These practices would provide a major opportunity for democratising the economy, and public policies in particular, by introducing new participative forms of governance.

The contractor will be asked to reflect on the following questions:

- How can public authorities help actors of the social economy and social enterprises to make the most out of the digital revolution?
- How can public authorities (European, national, regional and local) promote a better ownership of digital tools by actors of the social economy and social enterprises?

- What form(s) should this support take?
- How can they assist and accelerate the digital transformation undertaken by these actors?
- How can public authorities and social economy actors co-create regulations that have positive impacts on the potential of emerging technologies for addressing societal challenges and how can they minimize the negative externalities of such a process?

1.7. PERFORMANCE AND QUALITY REQUIREMENTS

The following list shows the expected results in concise and approximate terms, so as to give a general idea of what will be requested from the contractor.

The work should mobilise a large number of stakeholders and Member States contributing to the success of digitalisation, the uptake of new technologies by social economy actors especially social enterprises. The results should inform policy-makers at different level of governance, social economy organisations and social enterprises on more effective policies, partnerships, and initiatives in that field.

To measure the quality of the results at the end of the work, the key indicators include:

- Quality and adequacy of the methodological approaches and the overall consistency of the research design;
- Quality of the analysis of the situation and of the description of the state-of-the-art;
- Quality and level of support from stakeholders and policy makers for the work to be carried out;
- Quality of the selection and analysis of best practices;
- Quality of the proposed recommendations;
- Possible impact on national and regional policy making.

The contractor will also adhere to the following performance indicators:

- Management of the work-packages and tasks to planned milestones;
- Compliance with project aims, scheduling and budget;
- Timely delivery of results, reports on progress and deliverables.

1.8. STARTING DATE OF THE CONTRACT AND DURATION

It is expected that the contract is signed approximately in March 2018.

The contract shall enter into force on the date on which it is signed by the last contracting party. The duration of the tasks shall not exceed **12 months** from that date. The execution of the tasks shall not start before the contract has been signed or before the specific date specified in the contract. Work will follow the timetable detailed below.

1.9. VOLUME OF THE MARKET

The estimated maximum amount for the execution of all the tasks referred to in this call for tenders is **EUR 250 000** including all charges and expenses. No contract offer above this amount will be considered.

1.10. PLANNING, OUTPUTS AND DELIVERABLES

The contractor must submit the required reports and documents accompanied by the invoices for payments, where applicable, in accordance with these tender specifications and the conditions of the draft contract (see Article I.5 of the draft service contract – annex 1 to these tender specifications).

All reports, final, draft and working documents, the executive summaries and the brochure must be delivered in English (the executive summary and brochure drafts and final versions should be also delivered in French and German) in Microsoft Word (MS Word) and Portable Document Format (PDF) compatible formats. The contractor shall submit at the end of the contract a digital library of all digital materials on a USB key.

Each deliverable (if it is a report or other document) shall also be submitted in three copies in paper version.

The contractor shall submit the following deliverables and other documents to EASME and the Commission:

- Inception report following the kick-off meeting (month 1);
- Structure of the interim report (month 2)
- Structure of the brochure (month 6)
- Draft executive summary (month 6)
- Interim report (month 6)
- Final report (month 10)
- Brochure (month 10)
- Executive Summary (moth 10).

1.10.1. *Inception report*

An inception report shall include a detailed approach and first working assumptions (proposed methodology for the tasks to be carried out, including a work plan and time line) as well as the revised, if needed, timetable taking into account reflecting the conclusions of the kick-off meeting. It should be a maximum 10 pages document.

EASME will comment on the document submitted within **30 calendar days**.

1.10.2. *Intermediate outputs and deliverables*

An Interim Report must be delivered, comprising the following:

- Feedback and results of consultation of key stakeholders;
- First data collection of best practices;
- Description and an in-depth analysis of the policies and initiatives regarding digitalisation and new technologies impact on the social economy and social enterprises;

The size and the sections of the interim report will be agreed with EASME and the Commission, based on a proposal from the contractor submitted within 2 months of the signature of the contract. The contractor shall submit the draft interim report to EASME month 6.

The interim report will be integrated in the final report. Updates will be made, if appropriate.

EASME will comment on the document submitted **within 30 calendar days**.

1.10.3. *Final outputs and deliverables*

The final report shall include all the elements specified below (see also Section 2.1.1. "Final report"):

- Description of the state-of-play (update of the interim report where appropriate) with key challenges regarding the issues at stake;
- Recommendations focusing on how technologies inspire the social economy and social enterprises and how these technologies draw inspiration from practices of the social economy;
- Description of most relevant policies and initiatives (best practices) at EU and national relating to the issues at stake;
- Description of the common vision, role, priorities and supporting measures to promote the uptake of new digital technologies by social economy actors;
- High-quality report and widely disseminating and promoting the results;

The final report should constitute a solid contribution to the efforts to understand the impact on digitalisation and new technologies by social economy and social enterprises. It should also provide clear evidence and a good basis for future follow-up actions at EU and national levels.

The detailed structure, the size and the sections of the final report will be agreed with EASME and the Commission, based on a proposal made by the contractor submitted within 2 months of the signature of the contract. The contractor shall submit the final report and the brochure in month 12.

The structure of the brochure will be agreed between EASME and the Commission and the contractor based on the proposal submitted by the Contractor together with the Interim report (month 6). The draft brochure shall be submitted together with the draft final report (month 10) while the final brochure will be submitted together with the final report (month 12).

The draft executive summary will be agreed between EASME and the Commission and the contractor based on the proposal submitted by the Contractor together with the draft Interim report (month 6). The draft executive summary shall be submitted together with the draft final report (month 10) while the final executive summary will be submitted together with the final report (month 12).

EASME/EC will comment on the documents submitted within **30 calendar days**.

Tentative timetable (months/weeks/days)	**Meetings**	**Actions/Documents/Deliverables**
Signature of the contract = ref. date		Start date of the contract
Ref. date + 2 weeks	Kick-off meeting with EASME and the Commission	Kick-off meeting minutes to be drafted by the Contractor
Ref. date + 1 month		Inception report (with a detailed timetable)
Ref. date + 2 month		Submission of the proposal of the structure of the interim report
Ref. date + 6 months		Submission of the: - draft interim report - proposal of the structure of the brochure - draft executive summary
Ref. date + 7 months	Mid-course of the work meeting with EASME and the Commission	Discussion of the interim report and of the other submitted deliverables Submission of the invoice for interim payment Meeting minutes
Ref. date + 10 months;		Submission of the draft final report Submission of the draft executive summary Submission of the draft brochure
Ref. date + 11 months	Final meeting with EASME and the Commission	Discussion on the draft final report and the draft executive summary Discussion on the draft brochure Meeting minutes
Ref date + 12 months		Submission of the: - final report and final executive summary Submission of the final brochure

		Submission of the invoice for the payment of the balance

2. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES

The contractor must deliver the report as indicated below.

2.1. CONTENT

2.1.1. *Final and interim reports*

The final and interim reports must include:

- ✓ an abstract of no more than 200 words and an executive summary of maximum 6 pages, in English
- ✓ specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- ✓ the following disclaimer:

  "The information and views set out in this report are those of the author(s) and do not necessarily reflect the official opinion of EASME or of the Commission. Neither EASME, nor the Commission can guarantee the accuracy of the data included in this study. Neither EASME, nor the Commission or any person acting on their behalf may be held responsible for the use which may be made of the information contained therein."

2.1.2. *Publishable executive summary and brochure*

The publishable executive summary and brochure must be provided in English, German and French and must include:

- ✓ specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- ✓ the following disclaimer:

  "The information and views set out in this publication are those of the author(s) and do not necessarily reflect the official opinion of EASME or of the Commission. Neither EASME, nor the Commission can guarantee the accuracy of the data included in this study. Neither EASME, nor the Commission or any person acting on their behalf may be held responsible for the use which may be made of the information contained therein."

2.1.3. *Requirements for publication on Internet*

EASME is committed to making online information as accessible as possible to the largest possible number of users including those with visual, auditory, cognitive or physical disabilities, and those not having the latest technologies. The Commission supports the Web Content Accessibility Guidelines 2.0 of the W3C.

For full details on the Commission policy on accessibility for information providers, see: http://ec.europa.eu/ipg/standards/accessibility/index_en.htm

For the publishable versions of the study, abstract and executive summary, the contractor must respect the W3C guidelines for accessible pdf documents as provided at: http://www.w3.org/WAI/.

2.1.4. *Structure*

N/A

2.1.5. *Graphic requirements*

The contractor must deliver the final report and all publishable deliverables in full compliance with the corporate visual identity of the European Commission, by applying the graphic rules set out in the European Commission's Visual Identity Manual, including its logo. The graphic rules, the Manual and further information are available at:

http://ec.europa.eu/dgs/communication/services/visual_identity/index_en.htm

Professional graphic design

The contractor must apply the rules set out in Visual Identity Manual for the graphic design of both the cover page and the internal pages of the study. The professional font (EC Square Sans Pro) to be used for the study will be made available to the contractor free of charge upon acceptance of the terms and conditions of its use after contract signature. The use of templates for studies is exclusive to European Commission's (and EASME's) contractors. No template will be provided to tenderers while preparing their tenders.

3. INFORMATION ON TENDERING

3.1. PARTICIPATION

Participation in this procurement procedure is open on equal terms to all natural and legal persons coming within the scope of the Treaties, as well as to international organisations.

It is also open to all natural and legal persons established in a third country which has a special agreement with the Union in the field of public procurement on the conditions laid down in that agreement.

States covered by the Public Procurement Agreement concluded within the World Trade Organisation are not included in this call for tenders as the Executive Agencies are not signatories of the Agreement.

3.2. CONTRACTUAL CONDITIONS

The tenderer should bear in mind the provisions of the draft contract which specifies the rights and obligations of the contractor, particularly those on payments, performance of the contract, confidentiality, and checks and audits.

3.3. COMPLIANCE WITH APPLICABLE LAW

The tender must comply with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU[37].

[37] Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2004/18/EC (OJ L 94, 28.3.2014, p. 65).

3.4. Joint tenders

A joint tender is a situation where a tender is submitted by a group of economic operators (natural or legal persons). Joint tenders may include subcontractors in addition to the members of the group.

In case of joint tender, all members of the group assume joint and several liability towards the Contracting Authority for the performance of the contract as a whole, i.e. both financial and operational liability. Nevertheless, tenderers must designate one of the economic operators as a single point of contact ("the leader") for the Contracting Authority for administrative and financial aspects as well as operational management of the contract.

After the award, the Contracting Authority will sign the contract either with all members of the group, or with the leader on behalf of all members of the group, authorised by the other members via powers of attorney.

3.5. Sub-contracting

Subcontracting is the situation where a contract has been or is to be established between the contracting authority and a contractor/tenderer only and where the contractor or tenderer, in order to carry out that contract, enters into legal commitments with other entities for performing parts of the contract. The contracting authority has no direct legal commitment with the subcontractor(s). In practice, any third party involved in the contract implementation which has no legal link with the contracting authority but with the contractor will be considered as subcontractor (e.g. any other company which does not participate in the contract execution but provides financial capacity).

Subcontracting is permitted but the contractor will retain full liability towards the contracting authority for performance of the contract as a whole.

Tenderers are required to identify all subcontractors whose share of the contract is above 30 % and whose capacity is necessary to fulfil the selection criteria.

3.6. Costs

Tenderers themselves will bear the costs of drawing up their tenders and EASME will not be liable to pay any compensation if a tender is rejected or if it decides not to select any tender.

3.7. Content of the tender

- The tenders must be presented as follows:
- Part A: Identification of the tenderer (see Section 3.8)
- Part B: Non-exclusion (see Section 4.2)
- Part C: Selection (see Section 4.3)
- Part D: Technical offer (including Annex 6)

  The technical offer must cover all aspects and tasks required in the tender specifications (see section 1.4) and provide all the information needed to apply the award criteria (see section 4.4.). Offers deviating from the requirements or not covering all minimum requirements may be rejected on the basis of non-compliance with the tender specifications and will not be evaluated.

  For the appraisal, the written submission shall include a clear and detailed description of the organisation, technical and human resources and methodology proposed. The tenderers will provide a practical and detailed description of the technical and human resources and services proposed to achieve the objectives and results set out in Sections 1.3, 1.4, 1.6 and 1.7 above.

- Part E: Financial offer (Annex 7)

  The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to bear the risks or the benefits deriving from any variation.

  Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

- The quoted price must be a fixed amount which includes all charges (including travel and subsistence). Travel and subsistence expenses are not refundable separately.

3.8. IDENTIFICATION OF THE TENDERER: LEGAL CAPACITY AND STATUS

The tender must include a cover letter (letter of submission of tender - Annex 2) presenting the name of the tenderer (including all entities in case of joint offer) and identified subcontractors if applicable, and the name of the single point of contact (leader) in relation to this procedure.

In case of joint tender, the cover letter must be signed either by an authorised representative for each member, or by the leader authorised by the other members with powers of attorney (Annex 4). The signed powers of attorney must be included in the tender as well. Subcontractors that are identified in the tender must provide a letter of intent (Annex 5) signed by an authorised representative stating their willingness to provide the services presented in the tender and in line with the present tender specifications.

All tenderers (including all members of the group in case of joint tender) must provide a signed Legal Entity Form with its supporting evidence. The form is available on:

http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

Tenderers that are already registered in the Contracting Authority's accounting system (i.e. they have already been direct contractors) must provide the form but are not obliged to provide the supporting evidence.

The tenderer (or the leader in case of joint tender) must provide a Financial Identification Form with its supporting documents. Only one form per tender should be submitted. No form is needed for subcontractors and other members of the group in case of joint tender. The form is available on: http://ec.europa.eu/budget/contracts_grants/info_contracts/index_en.cfm.

The tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with Commission Recommendation 2003/361/EC[38]. This information is used for statistical purposes only.

[38] OJ L 124/36, 20.5.2003

4. EVALUATION AND AWARD

4.1. EVALUATION STEPS

The evaluation is based solely on the information provided in the submitted tender. It involves the following:

- ✓ Verification of non-exclusion of tenderers on the basis of the exclusion criteria
- ✓ Selection of tenderers on the basis of the selection criteria
- ✓ Verification of compliance with the minimum requirements set out in these tender specifications
- ✓ Evaluation of tenders on the basis of the award criteria

The contracting authority may reject abnormally low tenders, in particular if it established that the tenderer or a subcontractor does not comply with applicable obligations in the fields of environmental, social and labour law.

The Contracting Authority will assess these criteria in no particular order. The successful tenderer must pass all criteria to be awarded the contract.

4.2. VERIFICATION OF NON-EXCLUSION

All tenderers must provide a declaration on honour (Annex 3), signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in that declaration on honour.

In case of joint tender, each member of the group must provide a declaration on honour signed by an authorised representative.

In case of subcontracting, all subcontractors whose share of the contract is above 30 % or whose capacity is necessary to fulfil the selection criteria must provide a declaration on honour signed by an authorised representative.

The Contracting Authority reserves the right to verify whether the successful tenderer is in one of the situations of exclusion by requiring the supporting documents listed in the declaration of honour.

The successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender and to all subcontractors whose share of the contract is above 30 % or whose capacity is necessary to fulfil the selection criteria.

The obligation to submit supporting evidence does not apply to international organisations.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the contracting authority can access the document in question on a national database free of charge.

4.3. SELECTION CRITERIA

Tenderers must prove their legal, regulatory, economic, financial, technical and professional capacity to carry out the work subject to this procurement procedure.

The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

The tender must include the proportion of the contract that the tenderer intends to subcontract.

4.3.1. *Declaration and evidence*

The tenderers (and each member of the group in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the declaration on honour (see Annex 3), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them. In case of joint tender or subcontracting, the criteria applicable to the tenderer as a whole will be verified by combining the various declarations for a consolidated assessment.

This declaration is part of the declaration used for exclusion criteria (see Section 4.2) so only one declaration covering both aspects should be provided by each concerned entity.

The Contracting Authority will evaluate selection criteria on the basis of the declarations on honour (Annex 3), the information included in the tables in Annex 2.1 and Annex 2.2, fully completed and the evidence, where requested. Nevertheless, it reserves the right to require (additional) evidence of the legal and regulatory, financial and economic and technical and professional capacity of the tenderers at any time during the procurement procedure and contract performance. In such case the tenderer must provide the requested evidence without delay. The Contracting Authority may reject the tender if the requested evidence is not provided in due time.

After contract award, the successful tenderer will be required to provide the necessary evidence before signature of the contract and within a deadline given by the Contracting Authority. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the contracting authority can access the document in question on a national database free of charge.

4.3.2. *Legal and regulatory capacity*

Tenderers must prove that they are allowed to pursue the professional activity necessary to carry out the work subject to this call for tenders. The tenderer (including each member of the group in case of joint tender) must provide the following information in its tender if it has not been provided with the Legal Entity Form:

- For legal persons, a legible copy or of the notice of appointment of the persons authorised to represent the tenderer in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation applicable to the legal person requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.
- For natural persons, if required under applicable law, a proof of registration on a professional or trade register or any other official document showing the registration number.

4.3.3. *Economic and financial capacity criteria*

The tenderer must have the necessary economic and financial capacity to perform this contract until its end. In order to prove its capacity, the tenderer must comply with the following selection criterion:

Its average annual turnover for the last two years for which the accounts have been closed shall amount to at least one and a half times the volume of the market as specified in point II.1.5 of the contract notice. This criterion applies to the tenderer as a whole, i.e. the combined capacity of all members of a group in case of a joint tender and identified subcontractors.

To this effect, tenderers are requested to provide in their tender Annex 2.1 of these tender specifications completed with this information.

The following evidence (only in electronic version or link to website) will also be provided with the tender:

✓ Copy of the Profit and Loss accounts for the last two years for which the accounts have been closed from each concerned legal entity;

Failing that,

✓ Appropriate statements from banks;

or

✓ Evidence of professional risk indemnity insurance.

If, for some exceptional reason which the Contracting Authority considers justified, a tenderer is unable to provide one or other of the above documents, it may prove its economic and financial capacity by any other document which the Contracting Authority considers appropriate. In any case, the Contracting Authority must at least be notified of the exceptional reason and its justification. The Contracting Authority reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

4.3.4. *Technical and professional capacity criteria and evidence*

Tenders must provide in their tenders the table in Annex 2.2 of these tender specifications, exhaustively completed with all the necessary information.

The evidence mentioned below must be provided only on request, except for evidences B1, B2 and B3 (CVs) that should be a part of the submitted offer.

A. Criteria relating to tenderers:

Tenderers (in case of a joint tender the combined capacity of all members of the group and identified subcontractors) must comply with the criteria listed below.

The project references indicated below consist in a list of relevant services provided in the past 5 (five) years, with the sums, dates and clients, public or private, accompanied by statements issued by the clients, where available.

Criteria	Evidence
✓ Criterion A1: The tenderer must prove experience in the fields of digital social innovation or digital social entrepreneurship as well as, impact measurement in that field.	✓ Evidence A1: the tenderer must provide references for at least 2 (two) projects delivered in at least 1 of the fields in the last 5 (five) years with a minimum value for each project of EUR 200 000.
✓ Criterion A2: The tenderer must prove experience in the following fields: online survey techniques, desk research, data collection, analyses, identifying and documenting best practices and drafting technical reports and policy recommendations.	✓ Evidence A2: the tenderer must provide references for at least 2 (two) projects delivered in these fields (all fields should be covered in the projects referred) in the last 5 (five) years with a minimum value for each project of EUR 200 000.
✓ Criterion A3: The tenderer must prove capacity to work and draft reports in English.	✓ Evidence A3: - The tenderer must provide references for at least 2 (two) projects delivered in the last 5 (five) years showing that the work has been done in English. - The tenderer must provide one document of at least 10 (ten) pages (report, study, etc.) in English that it has drafted and published or delivered to a client in the last 5 (five) two years.
✓ Criterion A4: The tenderer must prove its capacity to work on projects covering at least 3 (three) EU countries at the same time.	✓ Evidence A4: the tenderer must provide references for at least 2 (two) projects delivered in the last 5 (five) years, each project covering at least 3 (three) EU countries.

Any tenderer with a professional conflict of interest will be rejected on the basis not fulfilling selection criteria for professional capacity.

B. Criteria relating to the team delivering the service:

The team delivering the service should include, as a minimum, the profiles specified below.

Evidence will consist in CVs of the team responsible to deliver the service. Each CV should indicate the intended function in the delivery of the service.

Criteria	Evidence
✓ Criterion B1: Project Manager: At least 5 (five) years of experience in project management, including, overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in at least 1 (one) project of at least EUR 200 000 and coverage (at least 3 countries covered), with experience in management of team of at least 5 (five) people.	✓ Evidence B1: curriculum vitae (CV)
✓ Criterion B2: Language: at least 3 (three) members of the team should have at least C1 level in English as per the Common European Framework for Reference for Languages[39].	✓ Evidence B2: A language certificate or past relevant experience or mother tongue
✓ Criterion B3: Expertise: At least 3 (three) experts of the team and the Project Manager should have at least 5 (five) years of experience each in the field of digital social innovation or digital social entrepreneurship.	✓ Evidence B3: CV

The detailed CV should include the relevant educational and professional qualifications and should be up to 2 (two) A4 pages for each of the team members and must specify:

- The different diplomas obtained (copies of which may be requested by EASME where appropriate);
- Languages spoken;
- Expertise and experience relevant to the subject matter of the present invitation to tender;

The contractor shall ensure that the staff members listed in the technical proposal are effectively available and assigned to the project when it begins.

4.4. AWARD CRITERIA

The contract will be awarded based on the most economically advantageous tender, according to the **best price-quality ratio** award method. The quality of the tender will be evaluated based on the following 3 award criteria. The maximum total quality score is 100 points.

Tenders that receive less than 60% of the maximum possible mark for the whole quality evaluation or less than 50% for each of the quality criteria will be eliminated and their final score will not be calculated. Tenders that do not reach the minimum quality levels will be rejected and will not be ranked.

Criteria	Points	

[39] The *Common European Framework of Reference for Languages*" (CEFR), See: http://www.coe.int/t/dg4/education/elp/elp-reg/cefr_EN.asp

✓ Criterion 1: Relevance of the proposed methodology This criterion will evaluate if the proposed approach to the implementation of the tasks is appropriate, well-described and structured, if it responds to the requirements of the specifications, is detailed enough and covers all the tasks listed in the specifications.	30 points	
✓ Criterion 2: Quality, appropriateness, coherence and completeness of the organisation of the proposed activities and of the work plan (detailed tasks description, including a clear timetable). This criterion will evaluate, inter alia: - if the tasks are well described, coherent, consistent and if the degree of completeness of the description of the work plan is sufficient; - if the proposed activities are supported by clear and rational justifications; - if the proposed interactions with key stakeholders is clear, credible and realistic (it is important to avoid formulating vague intentions and statements); - how the proposed interactions could contribute to the expected results; - if the quality and clarity of the information provided is sufficient regarding: - identification of sources of information, - information and data collections and assessment, - preparation, organisation and exploitation of surveys and interviews, - analysis and presentation of detailed findings and selection of best practices, - formulation of relevant conclusions and recommendations;	50 points	
✓ Criterion 3: Effectiveness, relevance and credibility of the proposed management and control measures concerning the relationships with stakeholders, consistency of service performance, quality of deliverables, language quality check, and continuity of the service in case of difficulties such as the absence of a member of the team. This criterion will evaluate, inter alia: - the quality of the project management plan and the sufficiency of the quality checks and control measures.	20 points	

The quality system should be detailed in the tender and specific to the tasks at hand. A generic quality system will result in a low score; - the proposed arrangements related with supervision of work and continuity of services, - how the roles and responsibilities of the proposed team and of the different economic operators (in case of joint tenders, including identified subcontractors, if applicable); - the global allocation of time and resources to the project and to each task or deliverable, and whether this allocation is adequate for the work. The tender should provide details on the allocation of time and human resources and the rationale behind the choice of this allocation. **Details should be provided as part of the technical offer.**		

4.5. Ranking of tenders

The contract will be awarded to the most economically advantageous tender, i.e. the tender offering the best **price-quality ratio** determined in accordance with the formula below. A weight of 70/30 is given to quality and price.

score for tender X	=	cheapest price / price of tender X	*	100	*	price weighting (30 %)	+	total quality score (out of 100) for all award criteria of tender X	*	quality criteria weighting (70 %)

The tender ranked first after applying the formula will be awarded the contract.

4.6. Information to tenderers on the final evaluation

EASME will inform tenderers of decisions reached concerning the award of the contract, including the grounds for any decision not to award a contract or to recommence the procedure.

EASME will inform all rejected tenderers of the reasons for their rejection and all tenderers submitting an admissible tender of the characteristics and relative advantages of the selected tender and the name of the successful tenderer.

However, certain information may be withheld where its release would impede law enforcement or otherwise be contrary to the public interest, or would prejudice the legitimate commercial interests of economic operators, public or private, or might prejudice fair competition between them.

5. Annexes

The following documents are annexed to these specifications and form an integral part of them:

Annex 1: Draft contract (for information)

Annex 2: Letter of submission of tender

- Annex 2.1. – Statement of turnover
- Annex 2.2. – Technical capacity

Annex 3: Declaration on honour on exclusion criteria and selection criteria

Annex 4: Power of attorney

Annex 5: Letter of intent for sub-contractors

Annex 6: Technical tender form

Annex 7: Financial offer

Annex 8: Checklist for Submission