

CALL FOR SERVICE TENDERS

SUBJECT: PROVIDING SERVICE FOR:

1. RESEARCH AND EVALUATION OF THE ECONOMIC IMPACT OF SOCIAL AND SOLIDARITY ECONOMY DEMONSTRATION ACTIONS AND SOCIAL AND COMPLEMENTARY CURRENCIES IN PALESTINE AND JORDAN.
2. QUANTITATIVE AND QUALITATIVE RESEARCH METHODS IN MEDITERRANEAN AREA.

PROJECT: CO-PRODUCTION OF SOCIAL POLICIES WITH SOCIAL AND SOLIDARITY ACTORS TO COMBAT POVERTY, INEQUALITY AND SOCIAL EXCLUSION PROJECT (MEDTOWN).

CO-FINANCED BY: THE EUROPEAN UNION THROUGH THE ENI MED 2014-2020 CROSS-BORDER COOPERATION PROGRAMME

BUDGET: 57,427 EUROS

DATE: 30 MAY 2020

DEADLINE FOR SUBMISSION OF TENDERS: 18 JUNE 2020, 12:00 NOON
PALESTINE TIME

TENDER OPENING: 25 JUNE 2020

CONTRACTING: 1 JULY 2020

1. Introduction

Palestinian Hydrology Group (PHG) is a nongovernment organization registered under NGO law in Palestine in 2001. PHG has signed a collaboration agreement with Cooperation for Peace Assembly (ACPP) to participate in implementing the project titled "Co-production of social policies with Social and Solidarity Economy actors to fight poverty, inequality and social exclusion" "MedTOWN" in partnership with 7 other partner organizations and 7 associate members from 6 Euro Mediterranean Countries.

The purpose of this document is to describe the work to be carried out and the conditions, guidelines, and general technical criteria that should serve as a basis for the performance of the service.

2. Background

MedTOWN is a cooperation project financed by the European Union through the European Neighbourhood Instrument of Cross Border Cooperation within the framework of the Mediterranean Basin 2014-2020 Programme. The main objective of the project is to promote and demonstrate initiatives of co-production of social policies through the cooperation of public, private and social solidarity economy (SSE) sector as well as to strengthen the role and the capacities of the SSE actors in the co-production model through a shared Community of Practice and a better regulated framework.

MedTOWN is an initiative focused on the combined potential of agents of the social and solidarity economy (SSE), citizenship and local authorities to co-produce the social policies that can fight poverty, inequality, social exclusion and environmental unsustainability in the riparian countries of the Mediterranean basin, providing them with tools and connections to help them build local resilience and foster their transition towards becoming more fair, resilient and sustainable societies in the Euro-Mediterranean region.

The initiative is based on Action Research to support the design of effective public policies on the provision of social services. To that effect a series of experimental actions deploying a co-production model will be undertaken and will serve both as effective modalities to increase the effectiveness of social services delivery during the project and as test-monitoring of results for policy design.

The research and analysis will be carried out in-country and regionalized through a Regional Community of Practices and a Regional Research Group who will elaborate studies, papers, seminars, workshops and policy recommendations. A tailored communication strategy will be co-designed with the actors involved both in-country, EU and at regional level, for awareness raising and dissemination.

The overall approach involves:

- A. **Demonstrative Actions** in all Countries.
- B. Supporting **Pilot Projects** in Greece, Palestine, Jordan and Tunisia to promote joint action from civil society and local government to support local economy and decent employment, responding to unmet needs for goods and services and helping to build trust and social cohesion
- C. **Policy support** through study of country's specific regulatory and legal frameworks, analysis of the results of the actions supported and the creation of sub-regional recommendations and lessons learned that will facilitate the interchange of experience during project development, the replication of actions and strategies in Mediterranean countries, and cross-border cooperation
- D. **Monitoring and analysis of the outcomes of the demonstrative actions and pilot projects.** A joint database and platform will be developed, and operationalized through the **Regional Research Group** to facilitate the replication, adaptation and implementation of projects and initiatives, as well as inter-cooperation between economic and social agents and institutions, and between countries.
- E. **Multi-level communication** aiming at revealing and clearly explaining, using quantifiable data and different tools, out-of-the-box approaches and perspectives that can lead to greater well-being, resilience and decision-making ability in the communities and regions participating in the project.

The **total budget of the project is 3.444.831,73 €** and is funded by 86,50% from the European Neighborhood Instrument (2.979.779,45 €).

The implementation period of the project is **36 months from 05/09/2019 to 04/09/2022.**

The partnership is composed by 9 partner organizations from 6 Mediterranean countries and 9 associate partners.

Partners:

- **BEN:** Assembly of Cooperation for Peace (ACPP), NGO, Spain
- **P1:** Tier 1 Technology SL (Tier 1 SL), Private Economic Operator, Spain
- **P2:** Scientific Society for Social Cohesion and Development (EPEKSA), No Profit, Greece
- **P3:** Agricultural Development Association (PARC), NGO, Palestine
- **P4:** Jordanian Hashemite Fund for Human Development (JOHUD), NGO, Jordan
- **P5:** Association of Tunisian Women for research on development (AFTURD), No Profit, Tunisia
- **P6:** Campolide Local Authority, Department of Social Services (JFC), Public Adm., Portugal



- **P7:** Palestinian Hydrology Group for Water and Environmental Resources Development (PHG), NGO, Palestine
- **P8:** Department of Social Affairs and Sports, Regional Government of Balearic Islands (CAIB), Public Adm., Spain

Associates:

- **ASS1:** Municipality of Seville, Spain
- **ASS2:** Andalusian Agency for International Cooperation for Development (AACID), ES
- **ASS3:** Ministry of Labour, Social Insurance and Social Solidarity, Greece
- **ASS4:** Ministry of the Women, Family and Childhood (MFFE), Tunisia
- **ASS5:** Birzeit University, Palestine
- **ASS6:** Environmental Quality Authority (EQA), Palestine
- **ASS7:** Ministry of Social Affairs (MSA), Tunisia

3. Legal basis

The following laws and regulations shall be considered for this tender and subsequently for contracting:

- Regulation (EU, EURATOM) No 1046/2018 of the European Parliament and of the Council of 18 July 2018, concerning the financial rules applicable to the general budget of the Union;
- Council Regulation (EC, Euratom) No 2988/95 of 18 December 1995 on the protection of the financial interests of the European Communities;
- Regulation (EC) No 232/2014 of the European Parliament and of the Council of March 11, 2014, establishing a European Neighborhood Instrument;
- Common rules for the application of ENI (Regulation (EC) No 236/2014) laying down common rules and procedures for the application of the Union instruments for the financing of external projects;
- Rules for the application of Council Regulation (EC) No 897/2014 of 18 August 2014 laying down specific provisions for the application of cross-border cooperation programs financed in accordance with Regulation (EU) No 232 / 2014 of the European Parliament and of the Council creating a European Neighborhood Instrument;
- Regulation (EU) n° 1407/2013 of the European Commission of 18 December 2013, concerning the application of Articles 107 and 108 of the Treaty on the Functioning of the European Union to de Minimis aid;
- Joint Operational Program for the Mediterranean Sea Basin of ENI CBC approved by the European Commission on 12/17/2015 (Decision No C (2015) 9133), and its annexes;
- All manuals and guidelines issued by the Program, in its latest version;
- The Financing Agreements signed between the European Commission and the Mediterranean Associated Countries;



- Palestinian Income Tax Law No.8 for 2011;
- The Grant Contract with the reference number MedTOWN A_A.3.2_0265 (04/09/2019) between the Peace Cooperation Assembly and the Management Authority of the ENI CBC MED Program 2014-2020;
- The Association Agreement between the partners of the MedTOWN project.

4. Purpose of the Tender

The purpose of this tender is to solicit the service of one or more entities or natural persons who can offer services of research and evaluation of the economic impact of the demonstrative actions that will be implemented by the MedTOWN project in Palestine and Jordan. In addition, research services on quantitative and qualitative research methods exist in Mediterranean Area is required. The service required under this tender document is described under Section 5 of this tender.

5. Required Service

Details of the service required are described hereunder:

LOT 1

Title: Social and Solidarity Economy Researcher for the demonstrative action in Palestine.

Budget: 22,775 euros including VAT

LOT 2

Title: Researcher Social and Solidarity Economy for the demonstrative action in Jordan.

Budget: 22,775 euros including VAT

Description of Required Service under Lot 1 and 2:

Recruitment of two researchers in Social and Solidarity Economy for action research, monitoring of the local demonstrative action, and to ensure public policy dialogue, one for Palestine, and another in Jordan.

Residence: Preferably in the area where the demonstrative action is carried out. The proximity of your habitual residence to the locality where the demonstration action takes place will be an assessment criterion.



Dedication: It must guarantee a dedication of 12 hours per week during 30 months, excluding vacation periods, to be distributed according to the schedule attached in Annex 3.

Responsibilities:

1. Describe the local economic and legal framework for the co-production of public policies and the SSE, as described in Annex 1.
2. To produce a report on the state of the art of the co-production of public policies with the actors of the Social and Solidarity Economy at a local level.
3. To map Social and Solidarity Economy actors as well as public administrations that may become involved and participate in the demonstration action, as defined in Annex 2.
4. Identify other local researchers (NGR) interested in the subject, and who are voluntarily interested in following the progress of the demonstration action, in order to form a national group of researchers in their country.
5. Collaborate in the definition of the evaluation framework and indicators for the evaluation and monitoring of the demonstration action with the MedTOWN research team.
6. Participate in the development of national guidelines to transfer content from research agendas to national policies and to ensure policy dialogue, in the languages of their territory and in English, and disseminate them within the national research group.
7. To carry out a participatory observation, taking part in the weekly coordination and follow-up meetings of the demonstration action that will act as the axis of coordination of the local partner responsible for the implementation of the demonstration action with the external agents involved, as well as in other dynamics and interactions when relevant.
8. Carry out the research according to the parameters defined in the methodology for measuring social and economic impact, and the UN Sustainable Development Goals, and according to the mapping, monitoring and evaluation needs that are defined.
9. Ensure the correct collection of quantitative data on transactions and operations carried out in the demonstration action, for the calculation of the defined indicators, with the collaboration of the supranational team of researchers of MedTOWN (RRG).

10. To regularly share the monitoring of the demonstration action with the team of researchers from other countries and with the supranational team of researchers.

11. Collaborate in the generation of three follow-up reports, one initial, one partial and one final.

12. The NRGs will contribute to the study and during the last year will review the findings at the national level to develop public policy recommendations.

13. Co-present the results of the three follow-up reports at one of the three meetings and assume the travel costs of their own travel and stay. The meetings will take place throughout the project in Tunisia, Greece and the Balearic Islands.

14. Collaborate with the local facilitator/trainer and the team of each project partner for the correct monitoring of the demonstration action and to select and evaluate a second round of pilot projects.

Qualifications Required:

- Bachelor's degree preferably in economics, sociology and anthropology or BSc in engineering degree.
- Proven research experience in the field of Social and Solidarity Economy.
- A doctoral degree in Social and Solidarity Economy will be valued
- Research experience in social and complementary currencies will be valued.
- An address close to the demonstrative action will be valued
- Mastery of the local language and English.
- The use of bibliographic reference management tools such as Zotero will be valued.

LOT 3

Title: Social Researcher expert in quantitative and qualitative research methods.

Budget: 11,877 euros including VAT

Description of Required Service

Dedication: It will guarantee a dedication of 4 hours/week during 30 months, excluding vacation periods, to be distributed according to the schedule attached in Annex 3.

Responsibilities:

1. It will coordinate the local researchers of Arabic speaking countries in methodological matters, ensuring that cultural differences between countries do not distort the results and the comparison between different demonstrative actions, guaranteeing that the comparisons (with control groups, ex-ante and ex-post, etc.) and possible extrapolations are adequate and rigorous.
2. It will coordinate with the rest of the team of Regional Experts.
3. It will ensure the validity of the results obtained in the demonstrative actions for the elaboration of publishable knowledge in the form of scientific articles on co-production of social policies and public policies, which can be used for the generation of action plans with public administrations.
4. It will participate in the definition of indicators and the construction of the evaluation framework.
5. It will ensure the comparative calculation of the effects of the local currency on the local economy (calculate the changes in the local multiplier of public expenditure according to the LM3 methodology of the New Economics Foundation).
6. In the first 2 semesters, the objectives and expected changes of each Action will be mapped.
7. Through the monitoring and evaluation framework of the demonstration and pilot actions, the online events that will be organised with the community of local and regional Social and Solidarity Economy actors, and through the technical support that will be given to the demonstration actions, s/he will ensure policy dialogue and knowledge sharing to frame actionable findings and recommendations.
8. Regional Research Group -of the Mediterranean Region- (RRG) and National Research Groups (NRG) will contribute to the study and over the last year will review the findings at the national level to develop policy recommendations.

Requirements:

- The service must ensure a professional team with expertise in economic impact assessment methodologies.
- Bachelor's degree, preferably in economics, sociology or anthropology, or engineering degree with specialization in qualitative and quantitative research.
- Proven research experience in the field of sociology and quantitative economics, with published books (with ISBN) or publications in relevant journals.
- A PhD in Quantitative Economics and Social Science Research Methodology will be an advantage.
- Research experience in social and complementary currencies.
- Mastery of the local language (Arabic) and English.
- The use of bibliographic reference management tools such as Zotero will be valued.

6. Instruction to Tenderers

- Tenderer shall respond to this call of tenders within the defined time and date set under item 7.
- Tenderers shall submit all required information and documentation as required.
- Tenderer may apply for one lot or in case of entities for all lots.
- In case of partnerships and consortiums, partnership agreement shall be submitted with the tender and roles of partners shall be clearly defined.
- PHG has the right to award the tender to one or more tenderers. Each lot may be awarded independently to different tenderer.
- Once awarded, regular meetings will be held with PHG and its partners and associated entities to coordinate the different studies being carried out during this period.
- Tenderers shall offer the maximum number of tools and instruments within the scope of the project in order to achieve a quality and representative result.
- The necessary data and resources will be made available to the contractor(s) in order to correctly develop the studies.
- At the beginning of the project, the system to be used to share bibliographic references will be defined in agreement with all researchers and will be shared by the entire scientific team (Zotero, Mendeley, etc.). The type of system that each applicant knows and handles, if any, must be specified.

7. Submission and opening of tenders

Documentation to be presented, form and content of the proposals

All relevant Documentation shall be submitted online before the day **18 of June 2020** to the following email address of PHG:

info@phg.org

This documentation must be duly signed by the bidder.

- Name and surname of the contact person / tenderer and postal and e-mail address.
- The documentation that accredits the personality of the tenderer by means of a photocopy of the Personal Identity Card , or document that replaces it.
 - Part 1: Curricula vitae of the proposed researchers.
 - Part 2: Methodological proposal (detailing phases, methodology and proposed bibliography management tools).



- Declaration included in Annex 4 signed by the bidder. This is a declaration of: compliance with the mandatory requirements (see point 15) and of not being in the situation of exclusion (point 16) and a declaration of the non-existence of a conflict of interest (Further proof of this might be requested after the award and before signing the contract.).

- Accreditation of the technical solvency of the bidder with:

- A list of the experience and main services performed in the last five years, including dates and recipient.
- Indication of the personnel participating in the contract (in the case of a company).
- Declaration indicating the material and equipment that will be available for the execution of the services (if necessary).

Elements of innovation that will bring improvements to the service.

Opening of tenders:

The opening session should be held at least one week after the deadline for submission of tenders.

Tenders will be opened in public session / virtual public session by the appointed committee on the following date and venue:

25 of June 2020 at 12.00h.

Emil Habibi Street - Masyoun - Ramallah / Virtual will be arranged and announced later via skype or zoom

The committee will draw up minutes of the meeting, which shall be available to tenderers on request.

After the public opening of the tenders, no information relating to the examination, clarification, evaluation or comparison of tenders or recommendations concerning the award of contract can be disclosed until after the contract has been awarded.

In the case that at the date of the opening session some tenders have not been delivered to the contracting authority but their representatives can show evidence that they have been sent on time, the contracting authority will allow them to participate in the first opening session and inform all representatives of the tenderers that a second opening session will be organised.

8. Criteria to consider in the award

Tenders which have passed the exclusion and selection phases will be assessed against the award criteria, which are divided into quality criteria and price.

The tender will be awarded according to the best price-quality ratio. The quality of the tender will be evaluated based on the Technical offer. The maximum total quality score is 80 points. The price will be evaluated according to the financial offer. The maximum total price score is 20.

The criteria to be taken into account, when considering which the most adequate proposal is, will be, in a decreasing manner, those indicated below, according to the weighting detailed for each of them:

Technical offer (80 points):

- Proposal, experience, resources and equipment (up to 40 points).

- Methodological approach (adaptation to needs and innovative elements) (up to 25 points).

Three points will be awarded for each publication, from the members of the team that appear in their CVs, in the most relevant scientific journals or books (with ISBN), two in the medium relevant ones and one in the less relevant ones, which contain the curricula vitae of the researchers (all references will be checked).

-Scientific synergies: It will be especially valued that the applicants have plans to carry out research related to the object of this contract during the period of execution of the same, and that said research can be used for the work included in this contract. In the event of wishing to accredit this situation, it will be necessary to include in the offer a section on "synergies" describing such research, the dedication that it will obtain on the part of the applicants and how it relates to the work envisaged in this contract (up to 15 points).

Financial Offer (20 points):

Financial offers should be in Euro (including VAT), should be one for each Lot, and should not exceed the amount approved for each Lot. All offers that will exceed the approved amount will be excluded.

Also, Financial offers should not be lower than 90% of the total approved budget.

¹ (If any of the offers exceed 40 points, the overall rating scale will be lowered so that all offers fall below 30 points).



Finally, according to the Palestinian Income Tax Law No.8 for 2011 for any tenderer that has no residence in Palestine, a 10% of the total value of each payment will be deducted immediately as income tax. PHG will be responsible to deposit this 10% in the income tax office.

After evaluation of the quality of the tender, the tenders are ranked using the formula below to determine the tender offering best value for money.

A weight of 80/100 is given to quality and a weight of 20/100 is given to price.

Score for tender= price score + quality score

- Price score (maximum 20 points): $X = (\text{cheapest price} / \text{price of tender}) * 20$
- Quality score (maximum 80 points): $\sum$ all award criteria of the technical offer of tender.

9. Processing of the file and award procedure

The hiring will be processed with open procedure looking for those companies or organizations that offer their services and valuing them according to different valuation criteria (see point 11).

10. Implementation Time Plan

The activities described in this tender will be developed during the period from 2020 to 2022:

The planned recruitments will be made and staff incorporated into the project by early June 2020.

The period of implementation of the activities will be linked to the availability of data in time and form to carry out studies and reports.

Annex 3 shows an indicative schedule of deliveries of products whose compliance is necessary for the collection of services

11. Territorial Scope

The territorial scope of the project will be mainly Palestine and Jordan. It will also be necessary to travel to carry out meetings with other project participants in other countries included in the project.

13. Budget applications

The expenditure arising from part A of this contract, including VAT, will be charged to the External expertise and Services budget application under "Regional Research on Quantitative & Qualitative Data", WP4: €11.877,00 (including VAT), "National Researcher in Palestine", WP5:€ 22.775,00 (including VAT) and "National Researcher in Jordan", WP5:€ 22.775,00 (including VAT)

14. Payment scheme

All invoices issued by the contractor must reflect the name of the project: "MEDTOWN", and the contract number, as a requirement for payment.

Payments will be made progressively in 4 phases:

1. A first advance payment of 30% of the total contract value will be made after the signing of the contract.
2. A second payment of 20% of the total contract value on 30 November 2020
3. A third payment of 20% of the total contract value on 30 September 2021
4. The last payment of 30% will be made with the delivery of the total of the products and activities of the contract.

In order to make each payment, it shall be a prerequisite that all the documents scheduled for delivery before the date of the payment in question have been delivered, in accordance with the schedule detailed in Annex 3.

Payments will be made within 21 days from the date of invoice.

15. Eligibility of Tenderers

- Participation is open to all natural persons who are nationals of and legal persons [participating either individually or in a grouping (consortium) of tenderers] which are effectively established in a Member State of the European Union or in an eligible country or territory as defined under the Regulation (EU) No 236/2014 establishing common rules and procedures for the implementation of the Union's instruments for external action (CIR) for the applicable instrument under which the contract is financed. Participation is also open to international organisations.]
- Individuals who may wish to apply for either lot shall submit proves of compliance with local tax laws.



- Individuals who may wish to apply for either lots shall submit proves of compliance with tax laws applicable in their country.
- Comply with the obligations derived from the general regulations on occupational risk prevention.
- Tenderer complies with the current provisions on labour matters, social integration of persons with disabilities, effective equality of women and men, tax, protection of personal data, and environmental matters.

Failure to comply with the eligibility requirements will make the offer presented dismissed.

16. Grounds for exclusion

Bidders will be excluded from participation in procurement procedures if:

- They are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- They, or persons having powers of representation, decision or control over them, have been convicted of an offence concerning their professional conduct by a judgment of a competent authority which has the force of res judicata; (i.e. against which no appeal is possible);
- They have been guilty of serious professional misconduct proven by any means which the contracting authority can justify;
- They have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- That they, or persons having powers of representation, decision-making or control over them, have been the subject of a judgment which has the force of res judicata for fraud, corruption, participation in a criminal organisation, money laundering or any other illegal activity, where such illegal activity is detrimental to the EU's financial interests;
- Are currently subject to an administrative penalty;
- Contracts may not be awarded to candidates, applicants or bidders who, during the procurement or grant award procedures, were not selected, or
- Are subject to a conflict of interest;



- Are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information;
- Are in one of the situations of exclusion from this procurement procedure or grant award procedure.

17. Confidentiality of information

The contractor must respect the confidentiality of the information to which he has access due to the execution of the contract.

The contractor undertakes to respect the strictest confidentiality with respect to all technical, commercial or other information that is recorded as part of the execution of the Service.

18. Notification of the award and formalization of the contract

The participants will be notified of the decision to award the contract within a maximum of five calendar days following the opening of tenders session (paragraph 10 of these specifications).

In the notification of the award addressed to the successful bidder, the interested party will be summoned so that, within a maximum period of five calendar days following its receipt, it can tender the contract.

19. Labour, social, fiscal, personal data protection, and environmental obligations of the contractor

The contractor will be obliged to comply with the provisions in force regarding social and tax security and, for companies, also in labour, safety and health at work, social integration of people with disabilities, effective equality of women and men, of protection of personal data, and in environmental matters.

20. Work program

Candidates selected shall submit, before signing the contract, a program in accordance with the provisions established, in which those responsible, conditions and terms of service shall be indicated.

21. Protection of personal data

The contractor is obliged to comply with the requirements set forth in current regulations regarding the protection of personal data and, in particular, those contained in Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (General Data Protection Regulation), and the regulation on data protection applicable in Jordan and Palestine.

In any case, the contractor will not be able to access documents, files, systems and media that contain personal data without express authorization.

22. Faculty of PHG on maintenance of quality standards in the provision of the service

The contractor must maintain quality standards and benefits equivalent to the financial criteria that served as the basis for the award of the contract.

The contractor - in the case of a company - must have substitute personnel with sufficient qualifications and experience to be able to replace the people who provide the services under the contract in cases of vacations, absences and / or illnesses.

23. Subcontracting or assignment of the contract

The transfer of the contract to other parties is prohibited. Winning contractor may subcontract up to 50% of the contract value to qualified persons or entities subject to the prior approval of PHG.

ANNEX 1

Mapping the Social and Solidarity Economy (1)

Country level information:

- Information on the state and development of social enterprises
- Information regarding the legal opportunities for public administrations to contract actors of the social and solidarity economy for the delivery of public services and public policies.
- Complementary currency legal framework in connection with the management of assets and payments in the framework of coproduction among public administrations and actors of the social and solidarity economy.

1. Information on the state and development of social enterprises.

- Introduction: The origins, development dynamics and balance of organisational types that have been referred to, labelled or defined as 'social enterprise'. Application of operational definition to identify social enterprise spectrum.
- Regional geography of social enterprises:
 - Legal form of social enterprises.
 - Please list the types of legal forms used for social businesses in the member state and the laws that regulate them.
 - Do social businesses benefit from any tax incentives or fiscal exemptions? Please give examples of where a social business' use of volunteers or ability to receive donations has tax implications.
 - Do social businesses benefit from any other exemptions or privileges?
 - Other categorisations of social enterprises (not legal terms, could include self-defined terms).
 - Ownership/ governance patterns.
 - Networks of social enterprises: consortia and umbrella groupings (e.g. for procurement purposes) set up by social enterprises.

2. Please summarise the social enterprise ecosystem within your country that is likely to affect the development of the demonstrative action in your country. This involves: Identification of the key actors/ agencies within the following groups:



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- a. Governmental departments or institutions designing or implementing policy, support, instruments and measures for social enterprises and infrastructures.
- b. Authorities designing and enforcing public procurement legislation, or putting these in practice.
- c. Authorities designing and enforcing legal, fiscal and regulatory frameworks.
- d. Organisations promoting, certifying and awarding social business labels, social business prizes, social reporting systems and other mechanisms to generate awareness and acknowledge the social value of the products, services or ways of production of social enterprises
- e. Institutions, civil society initiatives or other social enterprises promoting social entrepreneurship education and training, and presenting role models
- f. Organisations that have the capacity act as an observatory and to monitor the development and to the assess needs and opportunities of social entrepreneurs/social enterprises.
- g. Providers of social enterprise start up and development support services and facilities (such as incubators).
- h. Facilitators of learning and exchange platforms for social enterprises regarding business models, management tools and practices, and participatory approaches in driving social innovation.
- i. Organisers of social enterprise (support) networks, associations and pacts that engage in advocacy, mutual learning and facilitating joint action
- j. Organisers/managers of business links (trading, subcontracting) between social enterprises and with mainstream enterprises (SMEs and corporations).
- k. Organisers/managers of collaborative action with (incumbent) institutions and organisations delivering key social or community services or social security benefits as part of the welfare system.
- l. Providers of social finance (social impact investors or funds, philanthropic investors, social finance intermediaries, social business angels, crowd funding platforms etc.) for social enterprises and support infrastructures
- m. Organisations providing assistance to enhance the investment and contract readiness of social enterprises.
 - Information regarding the legal opportunities for public administrations to contract actors of the social and solidarity economy for the delivery of public

services and public policies (coproduction). Please identify and describe any possibility available in your country for actors in the social and solidarity economy to deliver public services.

3. Legal framework for complementary currencies.
 - a. Please describe the legal framework for the use of electronic money in your country, in connection with the delivery of public services and policies.
 - b. Mapping the legal framework for complementary currencies in connection with the delivery of public services in coproduction with the actors of the social and solidarity economy can be helpful from this six key areas of law:
 - i. Taxation
 - ii. Social Security and Employment
 - iii. Financial Services, Money Laundering and Note Printing
 - iii. Insurance
 - iv. Data Protection and Health and Safety
 - v. Public Sector acceptance of the complementary currencies

The document will analyse which of these 4 generic currency models could be used for coproduction by the actors of the social and solidarity economy with the public administration:

1. LETS
2. Timebank
3. Legal tender Backed Currency
4. Closed Loop Payment System

And from those which can, it will describe how are they affected by the relevant legislation.

ANNEX 2

Mapping the Social and Solidarity Economy (2)

Organizations information:

- List of organizations, particularly in your area, that might be relevant for MedTOWN project.

We need to pinpoint Social enterprises and organizations in your area that might be collaborating somehow with the demonstrative action we are undertaking.

We will need some details about them. The basic information we can work with is these data for each organization (We will send you a google form for you to fill out the information more easily):

- a. Name:
- b. Type of organization:
- c. Number of: Employees, volunteers, members, associates, etc.
- d. What does the organization do?
- e. What interest do they serve?
- f. For what group of people?
- g. Why do you think it might be of interest in relation with MedTOWN project?

Other stakeholder information:

- List of people, particularly in your area, that might be relevant for MedTOWN project.

- a. Name:
- b. Type of interest (researcher, activists, etc)
- c. What interest do they serve?
- d. For what group of people?
- e. Why do you think it might be of interest in relation with MedTOWN project?

ANNEX 3

TIME PLAN FOR OUTPUTS TO BE DELIVERED BY NATIONAL RESEARCHERS (DESCRIPTION 6.A)

This time plan is orientative. The dates and deadlines may change according to programme development.

Nbr	Activity	Output	start	end - deadline
1	Technical support on the demonstrative actions.	Researcher attends weekly meetings with the partner's managing team of the demonstrative action.	MAY-20	SEP-22
2	Each national researcher will undertake a pre-, a post- and mid-term monitoring of each Demonstrative Action, applying the Monitoring and Evaluation plan parameters.	pre-, a post and mid-term monitoring or evaluation report of the demonstrative action	MAY-20	SEP-22
3	Participate in the exchange of professionals online and in the national events of the Scientific Board in its own country presenting main findings, and one Scientific Board international event, to be agreed.	National Research Group (NRG) in action and active community of Practise (Community of Practise) to encourage policy dialogue	MAY-20	SEP-22
4	Analyse the Outlines of the Monitoring and Evaluation Plan and formulate a recommendation, including possible amendments and additions to it.	Report on the recommendations of the Outlines of the Monitoring and Evaluation plan. Monitoring and Evaluation plan updated	JAN-20	JUL-20
5	Map strategic Social and Solidarity Economy actors, local-national public and private stakeholders that will be involved in the project, legal framework for co-production and complementary currency systems, legal framework for co-production and complementary currency systems.	Two preliminary Studies per nation (existing regulations and in Social and Solidarity Economy, Public Contract possibilities for Social and Solidarity Economy actors and for the use of Complementary Currency systems in the delivery of these contracts, and a list of Social and Solidarity Economy actors suitable to become stakeholders of the demonstrative action) National Level	MAY-20	JUL-20
6	Produce key findings from the research of the Demonstrative Actions. Correct M&E plan when needed	One abstract per nation of Papers on co-production and Complementary currencies including key findings	SEP-20	MAR-21
7	Produce National policy Recommendations based in the key findings from the research of the Demonstrative Actions.	One National Policy Recommendations (in each nation) on co-production and Complementary currency systems: 1st set of recommendations after the Demonstrative Actions	SEP-20	JUN-21
8	Produce Regional policy Recommendations based in the key findings from the research of the Demonstrative Actions.	One Regional Policy Recommendations on co-production and Complementary Currency systems: 1st set of recommendations after the Demonstrative Actions	SEP-20	AUG-21
9	Map strategic Social and Solidarity Economy actors, local-national public and private stakeholders that will be involved in the project.	Two Updated Studies per nation on existing regulations and Social and Solidarity Economy, Public Contract possibilities for Social and Solidarity Economy actors and for the use of Complementary Currency systems in the delivery of these contracts and a list of Social and Solidarity Economy actors suitable to become stakeholders of the demonstrative action).	JUL-21	JUN-22
10	Generate recommendations on the evaluation methodologies for the call for proposals of pilot projects.	Recommendations report about how to best evaluate the pilot projects submitted to the call for proposals, based on the social and economic impact of the projects.	DEC-20	JAN-22

11	Update Monitoring and evaluation plan including pilot projects	pre-, a post and mid-term monitoring or evaluation report of the demonstrative action	JAN-21	FEB-21
12	Produce key findings updates from the research of the Demonstrative Actions and pilot projects . Correct Monitoring and Evaluation plan when needed	One Paper per nation on coproduction with including key findings	FEB-21	APR-21
13	Produce National policy recommendations based in the key findings from the research of the Demonstrative Actions.	One National Policy Recommendations on co-production and Complementary Currency systems: 2nd set of recommendations after the Pilot Projects	APR-21	SEP-22

TIME PLAN FOR OUTPUTS TO BE DELIVERED BY REGIONAL EXPERT RESEARCHER IN QUANTITATIVE AND QUALITATIVE METHODS OF SOCIAL AND ECONOMIC RESEARCH (DESCRIPTION 6.B)

This time plan is orientative. The dates and deadlines may change according to programme development.

Nbr	Activity	Output	start	end - deadline
1	Technical support to the national researchers	Regional researcher is available for consultation as scheduled, to be determined.	MAY-20	SEP-22
2	Analyse the Outlines of the Monitoring and Evaluation Plan and formulate a recommendation, including possible amendments and additions to it.	Report on the recommendations of the Outlines of the Monitoring and Evaluation plan. Monitoring and Evaluation plan updated	JAN-20	JUL-20
3	Coordinate National researchers to carry out the mapping of the legal framework for coproduction of public policies with Social and Solidarity Economy actors and complementary currency systems	2 Preliminary Regional (international) Comparative Studies (existing regulations and in Social and Solidarity Economy, Public Contract possibilities for Social and Solidarity Economy actors and for the use of Complementary Currency systems in the delivery of these contracts and a list of Social and Solidarity Economy actors suitable to become stakeholders of the demonstrative action) international level	JUN-20	AUG-20
4	Coordinate and support national researchers in the production of key findings from the research of the Demonstrative Actions. Correct M&E plan when needed	One abstract per nation of Papers on co-production and Complementary currencies including key findings	SEP-20	MAR-21
5	Produce Regional policy Recommendations based in the key findings from the research of the Demonstrative Actions.	One Regional Policy Recommendations on co-production and Complementary Currency systems: 1st set of recommendations after the Demonstrative Actions	SEP-20	AUG-21
6	Participate in the exchange of professionals online and in the Scientific Board event which is to take place in Seville last quarter of 2021 approximately to present.	National Research Group in action and active community of Practise to encourage policy dialogue		
7	Coordinate National researchers in the update of the mapping of the legal framework for coproduction of public policies with Social and Solidarity Economy actors and complementary currency systems	2 Updated Regional Comparative Studies (existing regulations and in Social and Solidarity Economy, Public Contract possibilities for Social and Solidarity Economy actors and for the use of Complementary Currency systems in the delivery of these contracts, and a list of Social and Solidarity Economy actors suitable to become stakeholders of the demonstrative action) Regional Level	SEP-21	JUL-22
8	Generate recommendations on the evaluation methodologies for the call for proposals of pilot projects.	Recommendations report about how to best evaluate the pilot projects submitted to the call for proposals, based on the social and economic impact of the projects.	DEC-20	JAN-22
9	Update Monitoring and evaluation plan including pilot projects	pre-, a post and mid-term monitoring or evaluation report of the demonstrative action	JAN-21	FEB-21
10	Coordinate the national researchers for the production of key findings updates from the research of the Demonstrative Actions and pilot projects . Correct Monitoring and Evaluation plan when needed	One Paper per nation on co-production and Complementary currencies including key findings	FEB-21	APR-21
11	Produce Regional policy recommendations based in the key findings from the research of the Demonstrative Actions and the pilot projects.	1 Regional Policy Recommendations on co-production and Complementary Currencies: 2nd set of recommendations after the Pilot Projects	APR-21	SEP-22

ANNEX 4

Declaration on honour on mandatory criteria, exclusion criteria, selection criteria and conflict of interest.

The undersigned [*insert name of the signatory of this form*], representing:

<i>(only for natural persons)</i> himself or herself	<i>(only for legal persons)</i> the following legal person:
Name:	Full official name:
ID or passport number:	Official legal form:
	Statutory registration number:
('the person')	Full official address:
	VAT registration number:
	('the person')

The person is not required to submit the declaration on exclusion criteria if the same declaration has already been submitted for the purposes of another award procedure of the same contracting authority², provided the situation has not changed, and that the time that has elapsed since the issuing date of the declaration does not exceed one year.

In this case, the signatory declares that the person has already provided the same declaration on exclusion criteria for a previous procedure and confirms that there has been no change in its situation:

Date of the declaration	Full reference to previous procedure

The signatory declares that the person has already provided the documentary evidence for a previous procedure and confirms that there has been no change in its situation (if this is your case):

Document	Full reference to previous procedure
<i>Insert as many lines as necessary.</i>	

² The same institution or agency.

Selection criteria

declares that the above-mentioned person complies with the selection criteria applicable to it individually as provided in the tender documents:	YES	NO	N/A
(a) It has the legal and regulatory capacity to pursue the professional activity needed for performing the contract as required in sections 6 and 7 of the contract notice	☐	☐	☐
(b) It fulfills the applicable technical and professional criteria indicated in section 11 of the contract notice	☐	☐	☐
(c) It has no conflict of interest in carrying out the works described in this tender and working with the parties mentioned in section 2 (Background).	☐	☐	☐

the above-mentioned person is the sole tenderer or the leader in case of a consortium , declares that:	YES	NO	N/A
(d) the tenderer, including all members of the group in case of consortium and including subcontractors if applicable, complies with all the selection criteria, the mandatory requirements indicated in section 15, and is not in any of the cases indicated in section 16 "Grounds for Exclusion" for which a consolidated assessment will be made as provided in the tender documents.	☐	☐	☐

Evidence for selection

The signatory declares that the above-mentioned person is able to provide the necessary supporting documents listed in the relevant sections of the tender documents and which are not available electronically upon request and without delay.

The person is not required to submit the evidence if it has already been submitted for another procurement procedure of the same contracting authority³. The documents must have been issued no more than one year before the date of their request by the contracting authority and must still be valid at that date.

³ The same institution or agency.



The signatory declares that the person has already provided the documentary evidence for a previous procedure and confirms that there has been no change in its situation:

Document	Full reference to previous procedure
<i>Insert as many lines as necessary.</i>	

The above-mentioned person may be subject to rejection from this procedure and to administrative sanctions (exclusion or financial penalty) if any of the declarations or information provided as a condition for participating in this procedure prove to be false.]

Full name

Date

Signature

ANNEX 5

FINANCIAL OFFER

Reference of the Call of Tenders

“CALL FOR TENDERS TO CONTRACT A SERVICE FOR RESEARCH AND EVALUATION OF THE ECONOMIC IMPACT OF SOCIAL AND SOLIDARITY ECONOMY DEMONSTRATION ACTIONS AND SOCIAL AND COMPLEMENTARY CURRENCIES IN ONE OF THE COUNTRIES INCLUDED IN THE MEDTOWN PROJECT “CO-PRODUCTION OF SOCIAL POLICIES WITH social and solidarity ACTORS TO COMBAT POVERTY, INEQUALITY AND SOCIAL EXCLUSION”, CO-FINANCED BY THE EUROPEAN UNION THROUGH THE ENI cbc MED Programme 2014-2020”

In response to the above mentioned call of tenders we hereby submit the financial offer. This offer is valid for a period of 90 days from the final date for submission of tenders.

Cost Category	Output - Item	Value in Euros (without VAT)	Value in Euros (including VAT)
External Services	Lot 1. National Researcher for Palestine	 €	 €
	Lot 2: National researcher for Jordan	 €	 €
	Lot 3: Regional Expert Researcher in Quantitative and Qualitative Methods of social and Economic Research.	 €	 €
Total Value		 €	 €

Place, date

Signature and stamp of the tenderer