

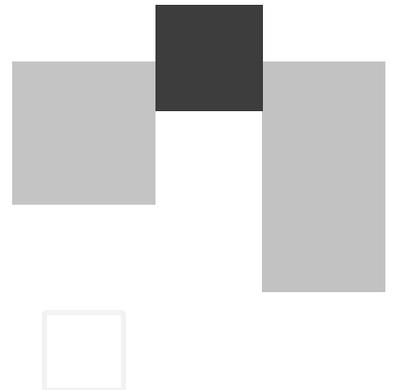
Study supporting the Impact Assessment of the future European Social Fund proposal

TECHNICAL PROPOSAL

Vilnius, 2023

Technical proposal under the multiple framework contracts EMPL/2020/OP/0016

Proposal led by Visionary Analytics



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Abbreviations

EU	European Union
EC	European Commission
ESF	European Social Fund
DG EMPL	Directorate-General Employment, Social Affairs and Inclusion
IP	Investment Priority
KoM	Kick-off meeting
MA	Managing Authority
MS	Member State
NE	National Expert
OP	Operational Programme
PC	Project Coordinator
PT	Project Team
PM	Project Manager
TS	Technical Specifications

Introduction

This proposal contains response to the request for services for the Study supporting the Impact Assessment of the future European Social Fund (*hereinafter* – ESF) proposal, according to the requirements laid out in the technical specifications (*hereinafter* – TS). We would like to emphasise the following strengths of our proposal:

- The study is designed to **contribute to increasing the sustainability of ESF operations** as well as provide an input to impact assessment of the future ESF. The four Tasks of the study revolve around cross-cutting questions:
 - How can calls for proposals be classified in terms of the characteristics of the respective operations awarded? Are there any common characteristics of the operations awarded via calls for proposals? How many of ESF 2014-2020 operations were awarded via calls for proposals as opposed to other means of implementation?
 - How can operation sustainability be defined and reached in terms of their (premature) (dis)continuation after the end of the operation? What characteristics of calls for proposals determine operation continuation and its sustainability?
 - How can the design and implementation processes of calls for proposals be improved to ensure the long-lasting impact of selected operations and reach of underlying ESF objectives? What support (and in what form) is needed to MAs to ensure that calls for proposals are designed and implemented in a most effective way supporting the sustainability of operations selected?
- Understanding that currently the **knowledge on the calls for proposals** in relation to ensuring the sustainability and long-term impact of ESF operations as opposed to other means of implementation (e.g. direct award) is rather limited, we tailor our methodology to expanding it to the maximum extent possible. Therefore, the proposed core data collection and analysis methods aim to:
 - Provide evidence-base covering all Member States (MS). Considering the varying quality and availability of data on ESF operations and calls for proposals among the MS, we propose sophisticated data collection methods tailored to each MS. For efficiency, methods such as web scrapping are proposed to collect data from publicly available resources when data cannot be provided by Managing Authorities (*hereinafter* – MAs) and it is too costly to collect it by hand.
 - Provide in-depth analysis of cases that illustrate the main reasons behind the choice of calls for proposals and their characteristics which lead to both continuation and premature end of ESF operations. We will carry out an in-depth analysis on 10 selected operations investigating factors of their (dis)continuation, sustainability, and design elements as well as other pros and cons of respective calls for proposals following which the operations were awarded.
- Understanding that the study will only be relevant insofar as its results are accepted, understood, and practically applied by EU and MS level stakeholders, our approach to study implementation relies heavily on **active and continued involvement of the key stakeholders**:
 - EU and MS level stakeholders will be engaged throughout the study by, e.g. conducting a MA survey and a quick scan of beneficiaries to not only collect relevant data for the assignment but, more importantly, gain an understanding of their opinions and insights in relation to operation sustainability, the design and implementation of calls for proposals and potential future improvements.
 - We foresee two stakeholder engagement events – technical webinar and presentation of study results to the Technical Working Group of the ESF+ Committee members, which will serve as platforms for presenting, discussing, and validating the preliminary study recommendations at the same time ensuring that the key stakeholders fully understand and feel committed to the proposed changes.
 - We will dedicate significant efforts to developing the handbook and adapting it to MAS needs as well as making the ESF operation database as functional and relevant as possible. We foresee that these will be the key deliverables to be further practically used by MAs.
- The **expertise of the proposed team** covers key needs of this assignment. The Project Manager (*hereinafter* – PM) and Thematic Experts (*hereinafter* – TEs) have proven capacity in carrying out large scale studies at the EU level, including evaluation and studies in relation to EU funds, ESF – in particular. Their experience includes not only the use of research tools but vast and deep thematic knowledge including relevant for mapping of key stakeholders, an in-depth understanding of the governance, structure, and implementation of ESF. The team is comprised of highly experienced experts (the majority of whom are

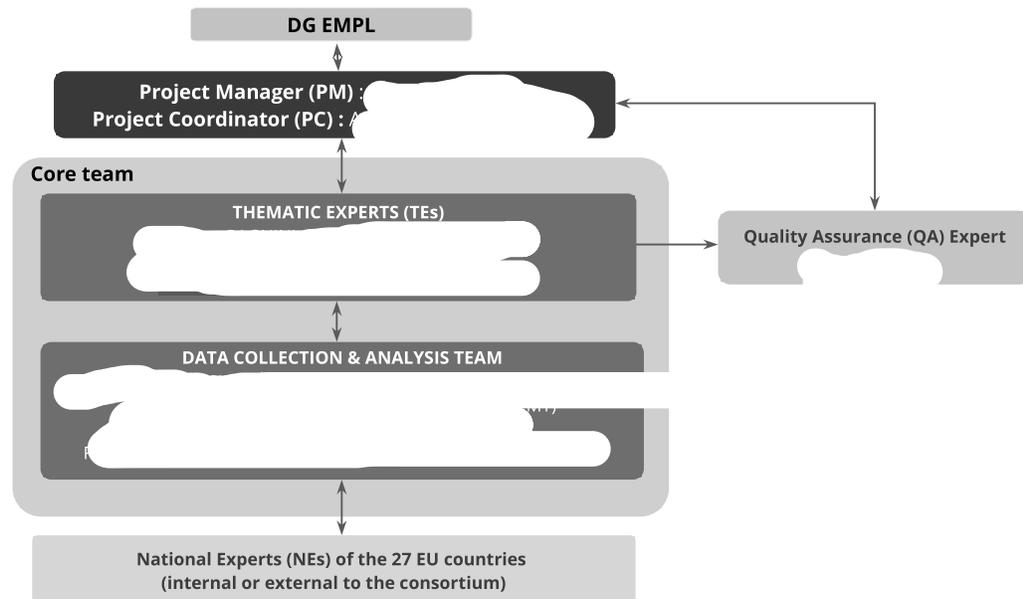
3. Work organisation

This chapter seeks to address the third qualitative award criterion: organisation of the work. It overviews the team composition and team members' roles (section 1.1) and workplan and allocation of resources (section 1.2).

3.1. Team composition

We propose a team of 31 expert (8 members of core PT, an external QA Expert and 22 NEs) with complementary experience and skills necessary to carry out their respective tasks to the highest scientific and quality standards. The selected project team ensures a balance between a profound knowledge of the ESF and additional relevant topics (e.g., operation sustainability, shared management, means of funding award and implementation, other EU funds). To add, the PT contains extensive evaluation, monitoring and impact assessment expertise, data collection and analysis skills and, lastly, experience in the management of EU-wide studies.

Figure 8. Structure of the Project Team (PT)



Source: Visionary Analytics, 2023

The proposed PT comprises the following roles:

- **PM** – () is experienced in managing EU-level projects that require overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience. He will be responsible for overseeing the overall project delivery, final quality control of all deliverables as well as their development process, communication with DG EMPL and conflict resolution.
- **TEs** comprised of members who have vast experience in conducting EU-level evaluations, impact assessments and studies related to ESF and other EU funds. Combination of thematic and methodological knowledge will be ensured by direct involvement of TEs in the core PT activities overseeing and contributing to all steps of the study development.
 - () will act as a lead oversight of Task 1, contribute to all study tasks and act as a NE for IT.
 - () will serve as a lead oversight of Task 3 and contribute to all study tasks.
 - (VA) will serve as lead oversight of Tasks 2 and 4 and contribute to all study tasks.
- **Data Collection and Analysis Experts** who will carry out study activities with the oversight and guidance of TEs:
 - () will lead Tasks 3 and 4 with support of assigned TEs and act as NE for LT. She will also assist PM in daily coordination of the activities and will act as a second contact point for the client in case of temporary absence of the PM (e.g. during sickness or annual leave).
 - () who will support data collection and analysis tasks in relation to the use of programming tools (e.g. R) and related techniques (e.g. web scraping). He will also act as NE for IE and MT.

- will lead Tasks 1 and 2 with support of assigned TEs and contribute to other study tasks.
- will support the implementation of study tasks (Tasks 1, 2 and 4) in close cooperation with and under guidance of more senior PT members. She will contribute to the technical organization of webinar (Task 4).
- **22 NEs** covering 23 EU MS (four MS are covered by the core PT members as described above) will contribute to the study implementation as core contacts to MAs collecting data on ESF operations, contributing to MA survey implementation, identifying MS level stakeholders and other foreseen tasks.
 - All experts are experienced and are at least of Cat III with most experts being of Cat I due to the complexity of the assignment and prior knowledge needed. The distribution of NEs by Category (excluding four NEs within core PT) is:
 - 16 MS (70%) are represented by Cat I experts
 - 5 MS (22%) are represented by Cat II experts
 - 2 Ms (8%) are represented by Cat III experts
 - MS such as AT and DE, LU and FR are represented by one NE each, whereas BE, due to the complexity of the MS structure, is represented by two NEs who will share the responsibility together.
 - NEs outside the core PT will be coordinated by PT members. Provisionally the following PT members will act as the main points of contact for the assigned NEs:
 - AT, BE, BG, CY, CZ, DE, DK, EE, EL, ES, FI
 - FR, HR, HU, LU, LV, NL, PL, PT, RO, SE, SI, SK
- **QA Expert** will not be involved in data collection and analysis and therefore will provide impartial quality assurance and comments on key deliverables.

The responsibilities are divided between different economic operators based on their expertise necessary for the implementation of this assignment (see Table 24 below).

Table 24. Distribution of responsibilities between different economic operators

Visionary Analytics (Project leader)	Fondazione Giacomo Brodolini - FGB (Subcontractor)	National Experts (partners and subcontractors internal or external to consortium)
<p>Project Management</p> <ul style="list-style-type: none"> ▪ Excellent project management skills and experience with EU policy studies. ▪ Thematic knowledge (EU funds, ESF operations, EU level and national policies) <p>Data collection and analysis</p> <ul style="list-style-type: none"> ▪ Strong statistical analysis skills. ▪ Strong data collection and analysis across the EU capacity. ▪ Report writing. ▪ Involvement in all tasks. ▪ English language check. 	<p>Thematic expertise</p> <ul style="list-style-type: none"> ▪ Profound knowledge on ESF structure, programme developments, implementation and evaluation (all experts). ▪ Strong research skills (all experts). ▪ Impartial quality check of results (Paul Jeffrey) ▪ Review of all key deliverables. 	<p>National expertise</p> <ul style="list-style-type: none"> ▪ Profound knowledge of ESF and other European funds in their respective MS ▪ Fluency in the national languages of their respective MS <p>Data collection and analysis</p> <ul style="list-style-type: none"> ▪ Strong research skills in data collection, conducting interviews and surveys, data analysis

Source: own elaborations.

The complex and specific object of the study implies that expertise on EU funds (ESF, in particular) and their research and evaluation competencies must be coupled with strong national context knowledge and understanding. Collectively, the proposed PT demonstrates the following strengths:

- Extensive knowledge and experience in both quantitative and qualitative data collection and analysis techniques and the capacity to work in different EU countries. The team is experienced in conducting large cross-country data collection and analysis which is of core importance for this study (including surveys, interviews, collecting, cleaning, and merging data sets, classifying data, typology development, application of criteria to short-list case studies).
- A combination of thematic knowledge both within TEs and Data Collection and Analysis Experts who have experience in conducting large scale EU evaluation studies, in particular – studies and evaluations on the ESF (e.g.: lead or contribution to DG EMPL projects ‘Study on the pathways to enhance the use of programme-specific indicators in ESF and ESF+’, July 2021 – January 2022; ‘ESF+ Data support centre, February 2020 – February 2022; ‘ESF 2007-2013 Ex-post evaluation Synthesis, January 2015 – December 2016)
- We also offer a well-balanced PT:

- o a) PM supported by PC which is necessary for efficient coordination between the PT and DG EMPL ensuring contact is maintained in case of short-term absence,
- o b) an experienced pool of NEs, whose expertise is necessary to collect all necessary data for the study and engage MAs throughout the activities,
- o c) Quality Assurance Expert, who will not take part in data collection and analysis, and thus will be able to provide objective and impartial comments.

Table 25 below indicates the specific roles and responsibilities of each expert, while their CVs present in-depth information on their skills and experience (enclosed separately to the technical offer). In addition, ‘Annex 1: Composition of the team’ provides information about the coverage of the languages from the PT (enclosed separately to the technical offer).

Table 25. List of roles and responsibilities of the PT

Name	Role in the Team and Responsibilities	Relevant competencies and experience
	<p>PROJECT MANAGER</p> <ul style="list-style-type: none"> • Overall supervision of organisational and managerial activities, ensuring their timely completion. • Central point of contact to liaise with DG EMPL and ensure on-going dialogue, incl. participation in all meetings, updates on progress via e-mail or telephone, provision of any clarifications, presentation of the results of the study (if requested). • A point of contact for the QA Expert. • Ensuring day-to-day quality of services through constant communication and feedback to all experts. • Developing and finalisation of the methodological tools (incl. operationalisation of study questions, interviews, survey, case study guidelines and reporting templates) in close cooperation with Task leads, finalisation of the work plan. • Final internal quality check of each draft and final inputs from project experts and provision of feedback. • Taking into account DG EMPL’s feedback and, in close cooperation with the PT, finalising the final deliverables. 	<p>is a Research Manager and Partner at Visionary Analytics. has a vast expertise in research, policy and EU/international comparative analysis and has excellent communication, project management and quality assurance skills acquired through leading and coordinating data collection and analysis expert teams, as well as liaising with clients on project deliverables, presenting final results to project steering groups and stakeholders. He has over 10 years of experience of project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution. For example, is currently leading DG EAC study “Scenarios for the Future of School Education in the EU – a Foresight Study” (ongoing) and led the ‘Evaluation of quality and effectiveness of short-term training financed via EU structural and investment funds.’ has also worked as an expert on the ‘Interim evaluation of the Operational programme for the European Union funds’ investments in 2014-2020’. holds MA in European Public Administration studies from Vilnius University.</p>
(Cat. I)	<p>THEMATIC EXPERT (LEAD OVERSIGHT – TASK 1)</p> <ul style="list-style-type: none"> • Works as a Task 1 lead oversight with the respective Data Collection and Analysis Expert by reviewing all research tools (e.g. guidelines for NEs, collected data analysis), advising on the data collection approaches and any implementation issues. • Provides thematic support and advice to the PT members in all tasks of the study (e.g. reviews the list of stakeholders, comments on survey results) • Participates at KoM, inception, interim and final meetings • Takes part at the internal recommendation drafting workshop 	<p>is a Senior Manager and Monitoring and Evaluation expert at Fondazione G. Brodolini. She has substantial experience in Monitoring, Impact Assessments, and Evaluation of EU level Structural funds as well as other EU funded programmes. For example, she worked as project manager for the Study on the pathways to enhance the use of programme-specific indicators in ESF and ESF+. She also worked as the task leader of the ESF Data Network for the ESF+ Data support centre, where she provided assistance to Managing Authorities and the DG EMPL on the monitoring systems for the ESF. Previously she focused on monitoring and evaluation of Structural and Cohesion funds and other national funds in Italy, for example working as a senior evaluation expert on the evaluation of the 2014-2020 ERDF Operational Programme for the Lombardy region, and as a researcher on the project ‘Evaluation of ESF funded measures in the Province of Grosseto’. holds a degree in Economics from University L. Bocconini, Milan, and a post-graduate specialisation in International trade from the Italian Foreign Trade Board.</p>

Name	Role in the Team and Responsibilities	Relevant competencies and experience
	<ul style="list-style-type: none"> • Contributes to and reviews all key project deliverables • Provides ad-hoc advice to the PT members based on needs. • Acts as NE for Italy. 	
	<p>THEMATIC EXPERT (LEAD OVERSIGHT – TASK 3)</p> <ul style="list-style-type: none"> • Works as a Task 3 lead oversight with the respective Data Collection and Analysis Expert by reviewing all research tools (e.g. operation selection for in-depth analysis, interview guidelines for NEs), advising on the approach and any implementation issues • Provides thematic support and advice to the PT members in all tasks of the study (e.g. reviews the list of stakeholders, typology development) • Participates at KoM, inception, interim and final meetings • Takes part at the internal recommendation drafting workshop • Contributes to and reviews all key project deliverables • Provides ad-hoc advice to the PT members based on needs. 	<p>is a Contract Manager and Expert at Fondazione G. Brodolini. He has much experience working on projects related to EU level funds. For example, he worked as Task Leader on the 'Study supporting the 2019 Evaluation of Youth Employment' which evaluated the results of youth-employment related ESF support and aimed to support the final stages of the Youth Employment Initiative and ESF programmes dedicated to youth. Further experience includes working as an evaluation expert and project manager on the independent evaluation of the 2014-2020 ERDF Operational Programme of Lombardy Region, as a thematic expert and project manager on the project 'ESF 2007-2014 Ex-post evaluation synthesis', and as an evaluator on 'ESF 2007-2013 Ex-post evaluation: access and sustainable integration into employment'. He holds an MSc in International Trade and Economics from the University of Rome 3.</p>
	<p>THEMATIC EXPERT (LEAD OVERSIGHT – TASKS 2 AND 4)</p> <ul style="list-style-type: none"> • Works as a Tasks 2 and 4 lead oversight with the respective Data Collection and Analysis Expert by reviewing all research tools (e.g. survey questionnaire, list of respondents), advising on the approach and any implementation issues. • Provides thematic support and advice to the PT members in all tasks of the study (e.g. reviews the list of stakeholders, typology development) • Participates at KoM, inception, interim and final meetings. • Takes part at the internal recommendation drafting workshop • Contributes to and reviews all key project deliverables. • Provides ad-hoc advice to the PT members based on needs. 	<p>is a Founding Partner and Research Manager at Visionary Analytics. He is highly experienced in managing large complex EU-wide projects that require overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience. His experience includes working as a Project Manager on 'the analysis of the quality and efficiency of the trainings financed by the ESF', and as a national expert for Lithuania on 'the analysis of the outcome of the negotiations concerning the Partnership Agreements and ESF Operational Programmes, including multi-fund programmes, for the programming period 2014-2020'. Further past projects include: EU and ILO: Shaping the Future of Work (EP, 2019), "DiWork - Digitalising public services: Making it work for citizens, business and workers" (CESI, 2022), Evaluation of quality and development of social dialogue in Lithuania (Ministry of Finance of the Republic of Lithuania, 2020), currently leads a Study exploring the social, economic and legal context and trends of telework and the right to disconnect, in the context of digitalisation and the future of work, during and beyond the Covid-19 pandemic (DG EMPL). He has also co-authored evaluation guidelines, published a number of books and academic papers on future of skills and work as well as evaluation theory and practice; holds a PhD from Vilnius University and MSc from London School of Economics.</p>
	<p>QUALITY ASSURANCE EXPERT</p> <ul style="list-style-type: none"> • Impartially yet constructively reviews the assigned deliverables (inception, interim and final reports) following internal/ DG EMPL QA checklists. • Flags any potential quality risks for the project to the PM in a timely manner. • Documents all feedback and transmits it to the PM. • Participates in PT or DG EMPL meetings based on needs. 	<p>is the Director of / Associates, working as an affiliated researcher of FGB and self-employed independent expert. He has supported a wide range of EU projects across several disciplines, with over 30 years of experience as a project director, team leader, national expert, and quality assurance manager. He has experience working on employment markets, such as on evaluations of the Youth Employment Initiative and impact assessments of ESF+. Further experience includes working as a national expert (UK and Ireland) on ex-post evaluations of ERDF for SME Competitiveness, and as the UK expert for a study collecting monitoring data for ERDF and Cohesion Fund operations. He holds a BA in Town Planning from University of the South Bank, London, and completed a degree course to become a MRTPI.</p>