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# **Synthesis Report on Procurement for Social Economy**

**Insights, Challenges, and Opportunities for  
Advancing Social Procurement Across  
Eight European Regions**

*KMOP Policy Center, Advisory Partner - Belgium*

**OCTOBER 2025 | Belgium**

**PROSECO:** Procurement for (a) social economy - Implementation of social procurement  
for a sustainable transition

## Partners

### Province of Flemish Brabant (Lead partner, Belgium)

Alaturi de Voi Romania Foundation (Romania)

City of Lund (Sweden)

Oliveira de Azeméis Municipality (Portugal)

City of Turin (Italy)

Torino Social Impact (Italy)

Amsterdam Municipality (Netherlands)

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Central Greece Region (Greece)

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## 1. Executive Summary

The PROSECO (Procurement for Social Economy) project focuses on strengthening the implementation of social procurement as a strategic lever for sustainable transition across **eight European regions**. This synthesis report presents the findings from a comprehensive research exercise conducted between June and September 2025 to assess the current state of social procurement policies, implementation practices, and barriers in these regions.

This report serves as a foundational document for the PROSECO project by establishing a clear baseline understanding of the social procurement landscape across partner regions. By synthesising findings from desk research, surveys, and focus groups, it provides a multi-faceted analysis of both commonalities and differences in how regions approach social procurement. The report is designed to inform the development of regional action plans, particularly the identification and exchange of good practices, and the creation of improved policy instruments and support infrastructure to enable systematic social procurement implementation.

The research exercise and resultant synthesis report were guided by the following specific objectives:

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- **Analyse existing policy frameworks** at regional, national, and European levels that enable or mandate the integration of social criteria into public procurement processes, including reserved contracts, social clauses, and related mechanisms.
- **Identify gaps and implementation challenges** in current social procurement approaches, highlighting both common barriers across all regions and region-specific obstacles that prevent the translation of legal permission into systematic practice.
- **Assess the current state of implementation** across different dimensions (awareness and knowledge, leadership and governance, financial and human resources, institutional infrastructure) and for different stakeholder groups (public authorities, social economy organisations, regular economy actors, intermediary organisations).
- **Compare stakeholder perspectives** on social procurement, including the views of policymakers, procurement officers, social enterprises, private sector actors, and support organisations, to identify perception gaps, areas of consensus, and differing needs across target groups.
- **Document good practices and working solutions** already being implemented in partner regions that demonstrate effective approaches to overcoming barriers and could be shared, adapted, and potentially transferred to other contexts.
- **Develop evidence-based recommendations** for closing the implementation gap between legal possibility and systematic practice, based on identified needs, challenges, proven enablers, and the specific contexts of partner regions.
- **Establish a foundation for interregional learning** by creating a shared understanding of the social procurement implementation challenge and fostering a community of practice among PROSECO partners committed to transforming social procurement from exceptional experiment to normal practice.

## 2. Introduction

The PROSECO project brings together **nine partner organisations** from across Europe, each representing a different regional context and level of social procurement maturity:

-  **Italy (Turin)** – City of Turin and Torino Social Impact
-  **Belgium (Flemish Brabant)** – Province of Flemish Brabant
-  **Greece (Central Greece)** – Region of Central Greece
-  **Romania (National)** – ADV Romania
-  **Slovenia (Kranj)** – BSC Kranj
-  **Sweden (Lund)** – City of Lund
-  **Netherlands (Amsterdam)** – City of Amsterdam
-  **Portugal (National)** – Municipality of Oliveira de Azeméis & Porto Metropolitan Area

Despite differences in political systems, administrative cultures, and social economy development levels, all partners face a common challenge: **social procurement is legally possible but not systematically practiced.**

Public procurement represents approximately **14% of EU GDP**—billions of euros annually that could be leveraged for:

- Inclusive employment for disadvantaged groups
- Social enterprise development
- Community strengthening
- Sustainable transition

Yet across all **eight partner regions**, the integration of social criteria into procurement processes remains sporadic, project-dependent, and reliant on individual champions rather than embedded institutional systems.

## 2.1. Research Objectives

The central research aim was to understand why this implementation gap exists—what barriers prevent the translation of legal permission and political commitment into systematic practice, and what enablers could close this gap. The research sought to move beyond documenting that social procurement is underutilised (already known) to understanding the root causes of underutilization and identifying proven solutions that could be scaled and transferred across regions.

## 2.2. Three-Tiered Research Design

To capture a comprehensive picture of the social procurement landscape, the research employed three complementary methods, each designed to answer different questions and provide different types of evidence:

Figure 1: PROSECO Research Framework

Method	Purpose	Scope	Outcomes
Desk Research	What policies exist?	National & regional legal frameworks, policy documents, case studies	Policy maturity assessment, infrastructure mapping
Survey	How frequently is it practiced? What barriers exist?	111 respondents across 8 regions, 4 stakeholder types	Quantified implementation gap, barrier ranking
Focus Group	Why is the gap persistent? What	82 practitioners across 8 regions,	Root cause analysis,

	working solutions exist?	in-depth dialogue	transferable solutions
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This three-tiered approach enabled **triangulation** of findings—where desk research identified what policies exist, the survey quantified the gap between policy and practice, and focus groups revealed why the gap persists and what could close it. Each method compensated for the limitations of the others: desk research provided authoritative policy context but couldn't capture implementation reality; surveys reached broader audiences but couldn't probe deeply into complex issues; focus groups provided depth and nuance but with smaller, non-representative samples.

Together, the three methods provide a robust evidence base for understanding the social procurement implementation challenge and developing actionable recommendations.

The following sections present the findings from each research component in turn, followed by regional summaries that synthesize insights across all three methods, and conclude with evidence-based recommendations for transforming social procurement from exceptional experiment to systematic practice across PROSECO partner regions.

## 3. Desk Research Findings

### 3.1 What Desk Research Aimed to Understand

The desk research component sought to:

- **Identify existing national and regional/local policy frameworks** for social procurement across all **eight PROSECO regions**

- **Map implementation mechanisms** including funding structures, monitoring systems, and support infrastructure
- **Understand legal instruments available** to authorities, particularly reserved contracts and social clauses
- **Document barriers and enablers** at institutional level based on policy analysis and available evaluations
- **Assess policy maturity** by analysing the comprehensiveness of legal frameworks, existence of mandatory requirements, and evidence of systematic implementation

The desk research was conducted through systematic review of legislation, government policy documents, academic literature, project evaluations, and grey literature from each partner region between June and July 2025.

## 3.2 National Policy Frameworks

All eight PROSECO regions have enabled national legislation for social procurement, transposing EU Directives 2014/24/EU and 2014/25/EU on public procurement. However, significant variation exists in the scope, specificity, and binding nature of these frameworks.

**Table 1: National Legal Frameworks Comparison**

Region	Primary Legislation	Social Procurement Status	Key Provisions
<b>Slovenia</b>	Public Procurement Act (ZJN-3, 2015)	Permissive	Allows social and environmental criteria; Article 79 permits social clauses; not mandatory
<b>Greece</b>	Law 4412/2016 (transposing EU 2014/24/EU)	Permissive	Social criteria allowed in execution phase; Article 18 on reserved contracts for

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			social enterprises
<b>Belgium</b>	Federal Public Procurement Law (2016, revised 2017)	Permissive	Article 15 enables reserved contracts for sheltered workshops and work integration social enterprises; no mandatory application at national level
<b>Romania</b>	Social Economy Law 219/2015; Public Procurement Law 98/2016	Permissive (mandatory under development)	Defines social economy organizations; Article 5 enables social clauses; Senate approved 0.5% budget allocation mandate (2024, awaiting final passage)
<b>Italy</b>	Public Contracts Code (D.Lgs 36/2023, replacing 50/2016)	Permissive + Mandatory elements	Article 57 on social clauses; Article 61 on reserved contracts <sup>1</sup> ; Article 173 on human services and collaborative governance; mandatory worker absorption in certain contract transitions
<b>Sweden</b>	Public Procurement Act (LOU 2016:1145); Roadmap for Public Procurement 2025–2030 (6 Oct 2025) <sup>2</sup>	Permissive + Strategic national direction	Chapter 4/3 allows social considerations; Chapter 15 on reserved contracts; no mandatory requirements; New roadmap introduces Objective 8 for civil society/non-profit participation; options for lower

<sup>1</sup> Article 61 on reserved contracts for Type B cooperatives, social enterprises, and organisations employing at least 30% disadvantaged workers.

<sup>2</sup> **Sweden's Strategic Evolution:** On 6 October 2025, the Swedish Government published the "Roadmap for Public Procurement 2025–2030", introducing an explicit national strategy while maintaining decentralised implementation. The roadmap adds three new strategic objectives to the 2016 national strategy, including **Objective 8: "Public procurement shall be attractive for all suppliers, including small businesses and civil society organisations (idéburen verksamhet)"**. The roadmap highlights options to lower participation barriers (proportional requirements, reserved procurements, partnership models such as IOP, and earlier engagement in preparation/dialogue phases) but does not yet provide operational guidelines or indicators. Importantly, the Government has assigned the National Agency for Public Procurement (UHM) to examine how the civil society share of the public market can be measured and to propose legislative amendments clarifying the framework for IOP. Monitoring similarly remains decentralised. This represents a significant policy development since project fieldwork concluded, positioning Sweden to potentially move from permissive to more actively encouraging frameworks.

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			barriers (proportional requirements, reserved procurements, IOP models, dialogue phase engagement); assignment to UHM to measure civil society market share and propose legislative amendments
<b>Netherlands</b>	Public Procurement Act 2012; Jobs Agreement (national)	Permissive + Mandatory elements (national)	National Jobs Agreement creates binding quotas for disability employment; reserved contracts for social firms/sheltered work; PIANOo Expertise Center coordinates knowledge
<b>Portugal</b>	Public Procurement Code (Decree-Law 18/2008); National Strategy for Green Public Procurement 2030 (ECO2030)	Permissive (with legal anxiety)	Articles 42, 75, 54-A, 250-D allow social criteria in specifications, evaluation, execution; optional, not mandatory; environmental focus stronger than social

**Key Finding:** Legal permission for social procurement exists in all regions, meaning authorities can include social criteria. However, only **Italy** and the **Netherlands** have moved toward mandatory elements in specific circumstances. All other regions operate purely permissive frameworks where social procurement remains discretionary.

**Implications:** Permissive frameworks create **implementation variability**, uptake depends on local political will, individual champions, and available capacity rather than systematic obligation.

This explains why implementation patterns differ dramatically even within countries (e.g., Turin vs. other Italian municipalities; Amsterdam vs. other Dutch cities). Sweden's new roadmap signals potential evolution toward stronger national

direction, though operational implementation remains uncertain pending UHM findings and legislative amendments.

### 3.3. Regional/Local Policy Instruments

While national frameworks provide legal basis, **local-level policies determine actual implementation**. Desk research revealed significant variation in whether regions have translated national permission into operational practice.

*Table 2: Regional/Local Policy Frameworks<sup>3</sup>*

Region	Local Framework	Status	Key Features	Implementation Level
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<sup>3</sup> **Note on Comparative Assessment Methodology:**

This report uses comparative assessment across eight partner regions. Terms like "Advanced," "Strong," and "Systematic" are **relative designations** within the study context, not absolute claims of perfection.

- **"Advanced"** = most developed implementation among study regions
- **"Strong"** = functioning system with documented outcomes (vs. no system)
- **"Systematic"** = regular, documented practice (vs. sporadic/ad hoc)

These designations do not imply:

- Perfect systems
- Fully resourced infrastructure
- No improvement needed

All regions, including those rated "Advanced," face resource constraints and implementation challenges explicitly addressed in the recommendations sections.

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<p><b>Italy (Turin)<sup>4</sup></b></p>	<p>Regulation 307 (2005, amended 2024)</p>	<p>Binding requirement</p>	<p>Regulation 307:</p> <ul style="list-style-type: none"> <li>• 3% annual procurement mandate (City of Turin, operational since 2005)</li> <li>• City monitoring unit (1 dedicated staff, basic system) tracking placements</li> </ul> <p><b>Result:</b> 2,074 placements 2020-23 (67% women)</p> <p>Supporting Ecosystem: Buy Social platform, TSI coordination of 400+ partner ecosystem, Project-based training</p>	<p><b>Strong</b> - systematic</p>
<p><b>Belgium (Flanders)</b></p>	<p>Provincial initiatives + municipal directors</p>	<p>Guiding, non-binding</p>	<ul style="list-style-type: none"> <li>• 39 social economy directors in municipalities</li> <li>• Model clauses, doeners.be platform</li> <li>• Antwerp peer reviews (recurring)</li> <li>• MVOO tool (environmental, expandable to social)</li> <li>• <b>Gap:</b> Federal-Flemish definitional tension</li> </ul>	<p><b>Moderate</b> - variable uptake</p>
<p><b>Netherlands (Amsterdam)</b></p>	<p>Bureau Social Return structure</p>	<p>Binding framework</p>	<ul style="list-style-type: none"> <li>• €203M oversight across 930 contracts</li> <li>• WIZZR monitoring system</li> <li>• Five lead buyers + cross-departmental</li> </ul>	<p><b>Strong</b> – systematic</p>

<sup>4</sup> Turin's social procurement ecosystem includes both the City of Turin's Regulation 307 (binding local mandate with dedicated monitoring) and separate supportive initiatives by Torino Social Impact (TSI), an independent association. The Buy Social platform and training programs are TSI initiatives from EU-funded projects, not formal components of Regulation 307. The 2,074 placements data reflects City monitoring of Regulation 307 implementation."

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			<p>integration</p> <ul style="list-style-type: none"> <li>• University research partnerships</li> <li>• Social return policy document</li> </ul>	
<b>Sweden (Lund)</b>	Programme for Social Sustainability 2020-2030	Guiding, non-binding	<ul style="list-style-type: none"> <li>• Strategic framework positioning social procurement</li> <li>• 4 dialogue clauses (pilot)</li> <li>• Cross-functional working group</li> <li>• <b>Gap:</b> Not binding on procurement function</li> </ul>	<b>Emerging</b> - exploration phase
<b>Slovenia (Kranj)</b>	None	Project-based only	<ul style="list-style-type: none"> <li>• Social procurement only during EU projects</li> <li>• Ad hoc examples (Ljubljana, Maribor)</li> <li>• No permanent policy</li> </ul>	<b>Minimal</b> - unsustainable
<b>Greece (Central Greece)</b>	None	Informal networks	<ul style="list-style-type: none"> <li>• No regional/local policy framework</li> <li>• Ad hoc via EU projects (FEAD partnerships)</li> <li>• Volunteer-driven coordination</li> </ul>	<b>Minimal</b> - fragmented
<b>Romania (Iași)</b>	None	National law only	<ul style="list-style-type: none"> <li>• No local operationalisation beyond national framework</li> <li>• Reserved contracts only for sheltered workshops</li> <li>• WISEs excluded in practice</li> </ul>	<b>Minimal</b> - discriminatory application
<b>Portugal (Oliveira de Azeméis/ Porto Metropolitan)</b>	Municipal Social Development Plans (PMDS) + AMP protocols	Guiding, exploratory	<ul style="list-style-type: none"> <li>• 17 municipalities in Porto Metropolitan Area</li> <li>• Municipal employment/inclusion plans</li> </ul>	<b>Emerging</b> – pilot initiatives

Area)			<ul style="list-style-type: none"> <li>• Partnerships with social economy (IPSS, cooperatives)</li> <li>• Gaps: No unified monitoring, lack of harmonisation</li> </ul>	
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Note: This table presents regional/local frameworks and their associated implementation infrastructure. 'Key Features' include both legally mandated provisions and supporting mechanisms (platforms, tools, training) that enable implementation. All results shown reflect combined effects of national and local frameworks. The contexts of national legislations are covered in Section 3.2.

**Policy Maturity Spectrum:** Regions range from **project-dependent only** (Slovenia, Greece, Romania) → **guiding policies with support tools** (Sweden, Belgium, Portugal) → **binding requirements with supporting infrastructure**<sup>5</sup> (Turin, Amsterdam).

**Key Insight:** Local frameworks are **more determinative than national frameworks**. Turin's binding requirement –even if it is at the municipal level– + support infrastructure produces systematic results (2,074 placements); Amsterdam's institutional structure achieves €203M systematic management; other regions with only national permissive legislation [not binding] show sporadic, project-dependent application. The difference is not legal permission (all have it) but **operational mandate + implementation support ecosystem**.

### 3.4. Implementation Mechanisms

Beyond legal frameworks, **implementation mechanisms**—funding, monitoring, support structures—determine whether social procurement happens in practice. Desk research assessed the presence or absence of these enabling infrastructure elements.

<sup>5</sup> Supporting infrastructure includes: dedicated budget, central platform, helpdesk/support platform, monitoring system, regular training, and coordination unit. See Table 3 for detailed comparison.

**Table 3: Support Infrastructure by Region**

Element	Turin, Italy	Amster dam, Netherl ands	Flander s, Belgiu m	N o r t h E a s t R e g i o n , R o m a n i a	Lund, Swed en	Cent ral Gree ce	Kran j, Slov enia	Oliv iera, Port ugal
Dedicated Budget	✓ Local	✓ €203M	x	x	x	x	x	x
Central	✓ Buy	✓	doeners.b	x	x	x	x	x

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<b>Platform<sup>6</sup></b>	Social (TSI, voluntary)	Integrated	e + MVOO					
<b>Helpdesk/Support<sup>7</sup></b>	TSI awareness activities	✓ BSR guidance	Provincial (Antwerp)	X	X	X	X	X
<b>Monitoring System</b>	✓ Dedicated <sup>8</sup>	✓ WIZZR	Basic	X	X	X	X	X
<b>Training Programs</b>	✓ Project-based (EU-funded)	✓ Embedded (BSR)	✓ Recurring (Antwerp peer reviews)	X	Sporadic	Project-based	Project-based	SRPP training (2024)
<b>Coordination Unit</b>	✓ Yes (dedicated)	✓ Yes (BSR)	Provincial	X	X	X	X	X

**Critical Infrastructure Gaps Identified:**

- No dedicated national/regional budgets** for social procurement implementation support (training, monitoring, capacity building) in most regions. Only Turin and Amsterdam, to some extent, have dedicated institutional budgets. Authorities cannot justify staff time elsewhere; training depends on external project funding.

<sup>6</sup> Central platform" refers to a coordinated digital or institutional resource that facilitates buyer-supplier connections within the relevant jurisdiction (local, regional, or national level). This distinguishes regions with organized matching systems from those with fragmented or no platform infrastructure.

<sup>7</sup> Helpdesk/Support" refers to entities, offices, or platforms that provide awareness-raising support, B2B matchmaking support, guidance, coordination, and implementation assistance to contracting authorities, regardless of their formal organisational designation. This analytical category enables cross-regional comparison of support functions.

<sup>8</sup> Turin's monitoring system, while basic in capacity (1 dedicated City staff member), is one of only two regions with systematic outcome tracking. The designation 'dedicated monitoring system' reflects comparative assessment—most regions have no monitoring at all.

2. **Centralised platforms largely absent.** Only Turin's Buy Social and Amsterdam's integrated ecosystem provide comprehensive buyer-supplier matching.
3. **Systematic monitoring exists only in Turin and Amsterdam.** Dedicated units track contracts, placements, and demographics. All other regions have no aggregate data on application rates, jobs created, or impact, meaning they cannot demonstrate value or make evidence-based improvements.
4. **Training episodic, not embedded.** Antwerp peer reviews (recurring, expert-facilitated) work well but remain provincial. Other regions offer one-off workshops during EU projects. Social procurement is not included in standard procurement officer professional development or certification.

**Key Finding:** Turin and Amsterdam are the only regions with mandatory frameworks producing systematic results. Turin combines City of Turin's Regulation 307 (binding mandate + basic monitoring) with voluntary ecosystem support (TSI platform, awareness activities). Amsterdam has comprehensive institutional infrastructure (BSR + budget + WZZR). Both achieve documented outcomes despite different infrastructure models. Other regions lack infrastructure, explaining why legal permission doesn't translate to systematic practice. Permission without support results in minimal uptake.

### 3.5. Reserved Contracts and Social Clauses: Application Patterns

All regions legally permit both **reserved contracts** (tenders restricted to social enterprises) and **social clauses** (social requirements in regular tenders). Desk research examined actual usage patterns.

**Table 4: Application of Social Procurement Tools**

Region	Reserved	Social Clauses	Primary Sectors	Application
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	<b>Contracts</b>			<b>Level</b>
<b>Turin</b>	Type B cooperatives, social enterprises, and organizations, 30%+ disadvantaged	Regulation 307: systematic in Turin	Cleaning, catering, facility services, green maintenance	Moderate-High
<b>Flanders</b>	Article 15 for certified orgs	Variable by municipality	Cleaning, maintenance, adapted work, textiles	Moderate
<b>Amsterdam</b>	Social firms, sheltered work, Jobs Agreement quotas	Systematic	Cleaning, security, services, sheltered employment	High
<b>Lund</b>	Rare (exploratory)	Dialogue clauses (4 in Lund)	Cleaning, security, elderly care (piloting)	Low
<b>Kranj</b>	Rare (ad hoc: Ljubljana, Maribor)	Minimal	Cleaning, facility maintenance	Very Low
<b>Central Greece</b>	Limited (social services sector)	Sporadic	Social care, food (FEAD)	Low
<b>North East, Romania</b>	Only sheltered workshops (disability quotas)	Near-zero for WISEs	Sheltered units only	Very Low (discriminatory)
<b>Oliviera</b>	Legally	Optional (anxious	Not yet	Very Low

	permissible, rarely applied	application)	systematic	
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### Key Patterns Identified:

1. **Service contracts dominate:** Labour-intensive services (cleaning, catering, facility management) are most common for social criteria. Goods procurement and construction contracts rarely include social requirements, even where social enterprises operate in these sectors.
2. **Sheltered workshops vs. WISEs:** Reserved contracts concentrated in sheltered workshops (disability quotas) across all regions. Work Integration Social Enterprises underutilised despite legal eligibility.
3. **Geographic concentration:** Within countries, application clustered in specific localities (Turin, Flemish provinces with dedicated staff, Swedish major cities, Amsterdam). Local political will and expertise matter more than national legal framework.

## 3.6. Cross-Regional Summary: Desk Research Findings

### What Exists Across All 8 Regions

- Legal permission for social procurement (all transpose EU Directives 2014/24 & 2014/25)
- Definitions of social economy/social enterprises in legislation
- Reserved contracts and social clauses legally permitted
- National guidance materials (variable quality and uptake)
- Documented examples of application (even if sporadic)

### What Is Missing Across Most/All Regions

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- Mandatory requirements (except Turin's 3% local/municipal requirement and Netherlands' national Jobs Agreement quotas)
- Dedicated implementation budgets (except Turin locally and Amsterdam €203M)
- Systematic monitoring and data collection (except Turin and Amsterdam)
- Centralised support structures—helpdesks, platforms (partial: Turin's Buy Social, Antwerp peer reviews, Belgium's doeners.be, Amsterdam's integrated ecosystem)
- Coordination between policy levels (national-regional-local misalignment; federal-regional tensions)
- Integration with environmental procurement (GPP more advanced; social criteria not yet integrated into existing tools like MVOO)
- Professional development requirements (social procurement absent from standard training/certification)

**Key Insight: The Implementation Gap**

All regions can do social procurement (legal frameworks permit); few regions systematically do social procurement (implementation infrastructure absent).

Turin and Amsterdam demonstrate different pathways to systematic implementation:

- **Turin:** Binding mandate (Regulation 307) + good governance structure = 2,074 placements, achieved despite resource constraints (limited budget, developing infrastructure)
- **Amsterdam:** Institutional coordination + comprehensive infrastructure (€203M budget, WIZZR monitoring, BSR ecosystem) = €203M managed across 930 contracts

**Key insight:** Systematic results can be achieved through strong governance and binding mandates even when infrastructure is incomplete (Turin model), or through comprehensive infrastructure with institutional coordination (Amsterdam model).

Other regions have permission but lack both sufficient governance mechanisms and infrastructure, explaining sporadic application.

**Policy Maturity Assessment** (based on legal comprehensiveness, mandatory elements, systematic implementation):

**Table 5: Policy Maturity Across Regions**

<b>Maturity Level</b>	<b>Regions</b>	<b>Characteristics</b>
<b>ADVANCED</b>	Turin (Italy), Amsterdam (Netherlands)	Binding requirement OR strong institutional coordination + full infrastructure
<b>DEVELOPING</b>	Flanders (Belgium), Romania, Oliveira (Portugal)	Frameworks + partial support structures, but mostly non-binding + monitoring gaps
<b>EMERGING</b>	Lund (Sweden)	Strategic frameworks, limited implementation
<b>PROJECT-DEPENDENT</b>	Central Greece, Kranj (Slovenia)	Only during EU projects, no coordination

**Implication for Recommendations:** Closing the implementation gap requires **building missing infrastructure** (funding, platforms, training, monitoring) and **introducing mandates where voluntary involvement has failed**—not revising legal frameworks, which already exist to some extent and permit social procurement.

## 4. Survey Findings

### 4.1. Survey Overview

The survey component was designed to answer questions in five key areas:

1. **Awareness:** Do stakeholders know about social procurement tools and legal possibilities in their countries?
2. **Current Practice:** How frequently and in what ways is social procurement actually applied?
3. **Barriers:** What prevents wider implementation—and do different stakeholder groups face different obstacles?
4. **Enablers:** What factors support successful social procurement where it does happen?
5. **Needs:** What specific support do stakeholders require to increase social procurement uptake?

The online questionnaire was distributed between July and August 2025 across all eight partner regions, targeting four stakeholder groups representing both demand side (procurement authorities) and supply side (social enterprises) of social procurement.

### Survey Response Overview

- **Total respondents:** 111 across 8 regions (92.5% of 120 target)
- **Response rates by region:** Romania 100% (20), Slovenia 100% (20), Belgium 125% (25), Portugal 87% (13), Netherlands 75% (6), Italy 50% (10), Greece 50% (10), Sweden 35% (7)
- **Stakeholder distribution:** Authorities 45-50% (50+), Social Economy 31-35% (35+), Regular Economy 18-20% (20+), Subsidised Organisations 4-5% (5+)
- **Data quality variations warrant attention:** Amsterdam (n=6) and Lund (n=7) samples are not sufficient for precise regional comparison; Slovenia responded to a shortened survey limiting granular barrier analysis; Portugal's Portuguese-language instrument introduces translation comparability questions. Where these regions appear in cross-regional aggregate results,

findings should be treated as directional rather than precise, and are validated through focus group and desk research triangulation

## 4.2. Awareness Levels

**Overall finding:** Significant knowledge gaps persist despite legal frameworks existing in all regions.

**Table 6: Awareness Scores by Region<sup>9</sup>**

Region	Score (1-5)	% Limited/No Familiarity	Assessment	Status
Turin	3.7	10%	Highest	Reflects Regulation 307
Amsterdam	3	Unknown	Moderate	Data quality limited
Romania	3.3	25%	Moderate-Good	Legislative framework visible
Lund	3	Unknown	Moderate	Lower than framework suggests
Flanders	2.8	48%	Limited-Moderate	Nearly half lack awareness despite tools
Central Greece	2.6	50%	Limited	Early implementation stage

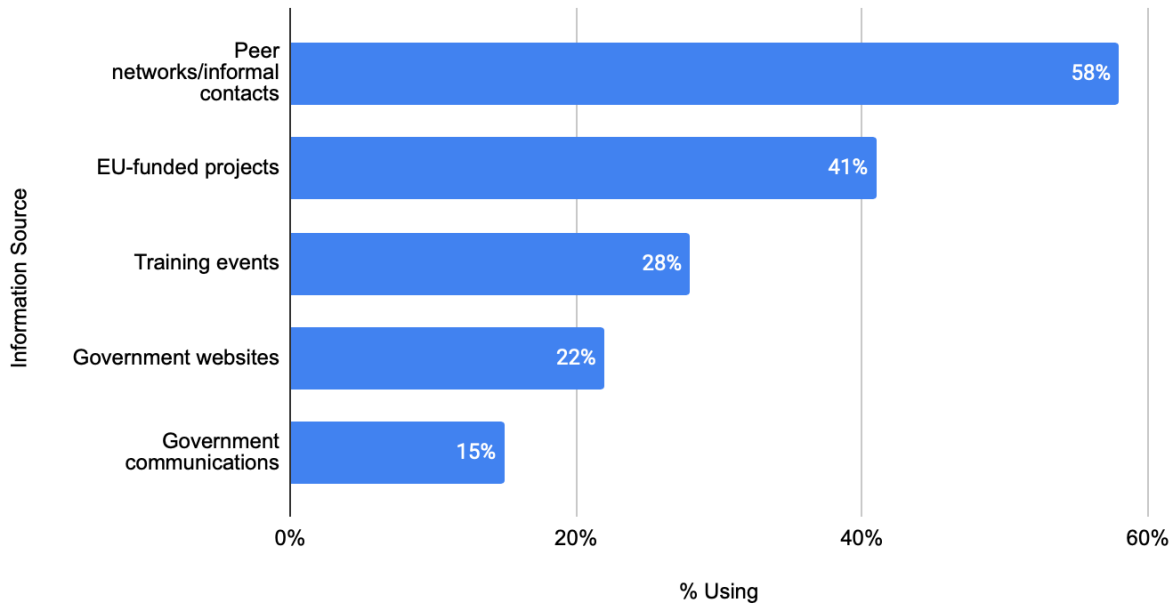
<sup>9</sup> Scores calculated as mean (average) response to survey question on familiarity with social procurement on a 5-point Likert scale (1 = Not familiar, 5 = Very familiar). Respondents rated their familiarity with social procurement tools, legal frameworks, and implementation practices in their region. % Limited/No Familiarity = percentage of respondents scoring 1-2 on the scale. Sample sizes by region: Turin n=10, Romania n=20, Flanders n=25, Central Greece n=10, Kranj n=20, Lund n=7, Amsterdam n=6, Oliveira n=13. Note: Data quality is limited in general due to small samples or late submission.

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<b>Kranj</b>	2.3	70%	Very Limited	Most lack detailed knowledge
<b>Oliveira</b>	2.8	62%	Limited-Moderate	Portuguese survey, early stage

**Information Sources** (where awareness comes from):

**Chart 1: Information Sources**



**Critical Gap:** Formal channels (government websites 22%, official communications 15%) dramatically underperform vs. informal networks (58%). Peer organisations are the actual working infrastructure—compensating for absent official systems but unsustainable long-term.

**Table 7: Awareness by Stakeholder Group**

Group	Mean Familiarity	% Limited/No Knowledge
Social Economy	3.2/5	38%
Authorities	2.9/5	<b>45%</b>
Regular Economy	2.6/5	52%

**Critical Finding:** Even **authorities—the primary implementers—show 45% with limited/no familiarity**. If procurement officers don't know about available tools, implementation cannot happen regardless of legal frameworks.

#### Specific Knowledge Gaps (Aggregate)

- **Reserved contracts:** Only 34% aware these are legally possible
- **Social clauses:** 47% aware they can be included in regular tenders
- **Monitoring methods:** Only 18% know how to verify compliance
- **Finding social enterprises:** 72% don't know where to find qualified suppliers

### 4.3. Current Practices

**Overall finding:** Social procurement application remains limited and sporadic across all regions.

**Table 8: Social Procurement Application Rates by Region**

Region	Never Applied	Rarely (1-2x/year)	Sometimes -Often	Implementation Level
Italy (Turin)	10%	30%	60%	High application - Turin effect visible
Belgium (Flanders)	24%	40%	36%	Moderate - but 64% apply rarely/never
Sweden (Lund)	~30%	~40%	~30%	Low (n=7 limits reliability)
Slovenia (Kranj)	35%	35%	30%	Low - project-dependent pattern
Greece (Central Greece)	40%	30%	30%	Very Low - highest "never" rate
Romania (Iași)	25%	40%	35%	Low-Moderate
Portugal (Oliviera)	0%	15%	85%	Highest application

**Key Statistics (Aggregate across all 8 countries):**

- **15-25% of public procurement** includes any social criteria (Turin as outlier: ~60%)
- **45% of authorities** have never applied social clauses
- **52% of social enterprises** have never participated in public procurement
- **65% of disadvantaged employment** concentrated in disability quota contracts, not broader social procurement

- **Portugal anomaly:** 85% engage in social enterprise collaboration (highest frequency)<sup>10</sup>

**Implementation Gap Quantified:** Survey confirms desk research finding—legal frameworks exist everywhere, but **systematic application happens only in Turin and unexpectedly frequent informal application in Portugal**. Most regions show **sporadic, sector-limited, project-dependent** patterns, with Portugal representing a new category: **frequent engagement without formal awareness**.

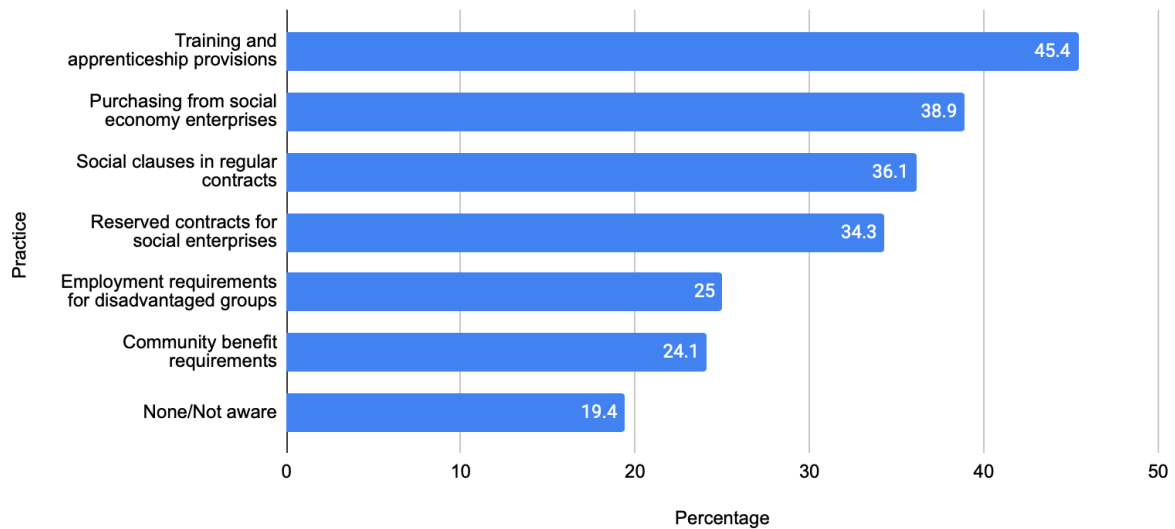
## Types of Social Procurement Practices Used

### *Chart 2: Social Criteria by Frequency of Use*

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<sup>10</sup> Portugal's high engagement rate (85%) despite low awareness (2.8/5) suggests informal practice rather than systematic knowledge of 'social procurement' as a policy framework. This likely reflects municipal employment and inclusion programs—operated through social partnerships with social solidarity institutions and cooperatives—that achieve social outcomes without being formally labeled or strategically managed as 'social procurement'. This pattern suggests **latent capacity**: practitioners already engage social economy actors for employment/inclusion, but do not conceptualize this as 'social procurement' and thus lack strategic optimization. This differs fundamentally from barriers in emerging regions (lack awareness + lack practice) versus Portugal (practice informally + lack strategic framing).

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**Pattern:** Training and apprenticeship provisions dominate (45.4%), reflecting both compliance mechanisms and workforce development focus. Traditional reserved contracts and direct purchasing from social economy enterprises show moderate uptake (34-39%), while stronger protections like employment guarantees and community benefits remain underutilized (24-25%).

**Key Findings:**

- **Training leads** (45.4%)—respondents consistently view skills development as core to social procurement
- **Middle tier** (34-39%)—reserved contracts, purchasing from social economy, and social clauses show relatively balanced adoption
- **Bottom tier** (24-25%)—employment guarantees and community benefit requirements remain less common, despite policy relevance
- **Notable:** 19.4% report no practices currently applied or lack awareness

**Interpretation:** The prominence of training over reserved contracts suggests procurement is being used more as a **development and skills tool** than as direct **market access for social enterprises**. Employment protections for disadvantaged

groups lag behind, indicating focus on process/upskilling rather than outcome/placement guarantees.

### Sectors Where Social Criteria Applied

**Most common:** Cleaning services (72% of those who apply social criteria), Facility maintenance (58%), Catering/food services (45%), Security services (32%)

**Least common:** Construction (8%), IT services (5%), Professional services (4%), Goods/supplies (12%)

**Pattern confirmed from desk research:** Service contracts with high labor content/ labour-intense contracts dominate. Goods, works, and technical services rarely include social criteria even where social enterprises operate in these sectors.

**Implementation gap quantified:** Survey confirms desk research finding—legal frameworks exist everywhere, but **systematic application happens nowhere except Turin**. Most regions show **sporadic, sector-limited, project-dependent** patterns.

## 4.4. Perceived Barriers

**Overall finding:** Multiple intersecting barriers, with knowledge and resource constraints dominant across all regions

### Barrier Ranking by Category

**Table 9: Main Barriers to Social Procurement (% citing as significant obstacle)**

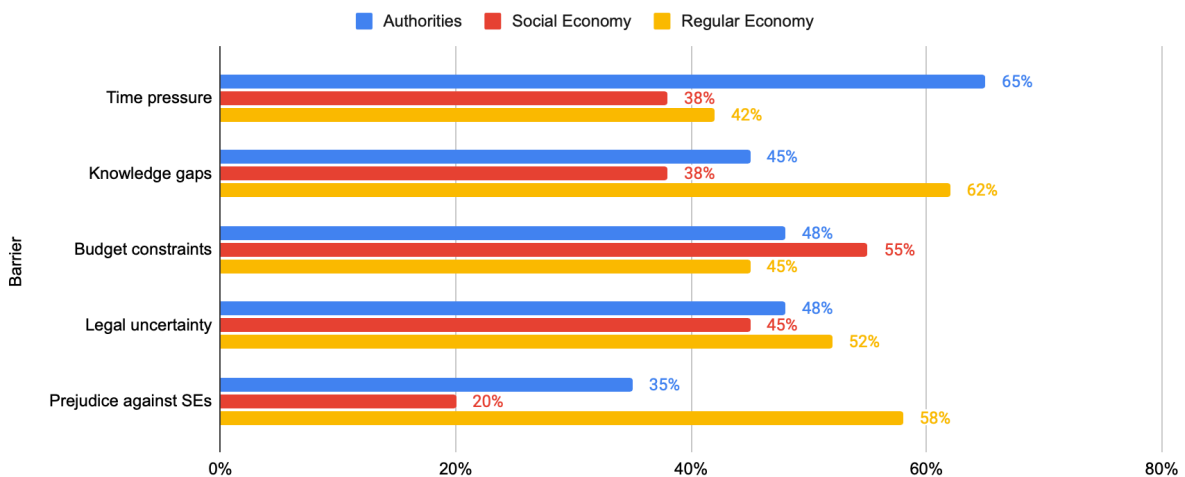
Barrier	Average %
Limited awareness/expertise	48-75%
Complex procedures	40-84%

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<b>Poor coordination</b>	24-52%
<b>Lack of monitoring systems</b>	25-45%
<b>Legal/regulatory uncertainty</b>	24-48%
<b>Insufficient suppliers</b>	20-35%
<b>Budget constraints</b>	15-25%

**Barriers by Stakeholder Group**

**Chart 3: Barrier Differences Across Stakeholder Types**



**Cross-Group Findings:**

**Legal uncertainty affects ALL stakeholder types equally** (Authorities 48%, Social Enterprises 45%, Regular Economy 52%)—this is **not a knowledge deficit of specific groups but a systemic communication failure**. If rules are unclear to everyone, the problem is the system (or its communication), not the audiences.

**Authorities face greatest time pressure** (65% vs. 38-42% others)—already overwhelmed procurement officers cannot add social criteria without dedicated support. **Private sector most uninformed** (62% lack knowledge) and most concerned about price competitiveness (58%)—suggests outreach campaigns neglect regular businesses. **Social enterprises cite budget barriers most** (55%)—reflects pre-financing and cash flow challenges, not procurement budgets themselves.

The variation in barrier profiles across stakeholder types has direct implications for intervention design. Authorities face severe time pressure (65% vs. 38-42% others) and require **dedicated staff capacity and clear mandates**—'we are too busy' cannot be solved with training alone. Social Enterprises cite budget constraints most acutely (55%) and require **financial mechanisms (pre-financing, payment terms restructuring, capacity building grants)** not merely information. The Regular Economy's knowledge gap (62%) and prejudice concerns (58%) indicate **basic awareness campaigns and evidence-based business case communications** targeting competitive concerns rather than social value messaging. A one-size-fits-all 'training program' or 'communication campaign' will fail to address these differentiated needs. Conversely, targeted interventions addressing each group's specific barrier profile can unlock uptake within each stakeholder category.

**Implication:** Different stakeholders need **tailored support**—authorities need time/capacity, social enterprises need financial mechanisms, the private sector needs basic awareness. But **legal clarity is a universal need**.

**Hidden Barrier– Pre-Financing Gap:** While 'budget constraints' appears in survey rankings, focus groups revealed a more specific structural exclusion: **social enterprises lack pre-financing capacity to compete in public tenders**. Large procurement contracts require suppliers to front material and labour costs before payment arrives (standard practice: payment 30-90 days post-invoice). Regular

companies use supplier credit or lines of credit; social enterprises—often lacking credit access and operating on thin margins—cannot afford to float costs.

**Implication:** Social enterprises (SEs) are excluded not by procurement rules but by cash flow reality. This manifests as 'insufficient suppliers' or 'cost concerns' in survey data, but the root cause is structural disadvantage in tendering capacity, not price or quality. Payment term restructuring (advance payments, instalment-based contracting, pre-financing support for SE bidders) removes this barrier without reducing prices or compromising procurement integrity."

### Regional Barrier Patterns

- **Emerging Regions (Kranj, Central Greece, Romania, Oliveira):** Emerging regions do not face isolated barriers; they face all major barriers simultaneously: knowledge gaps (70-75%), no leadership mandate (55-60%), no budget (60-65%), no coordination (50-55%), cultural unfamiliarity (45-55%). This 'barrier stack' has critical implications: piecemeal interventions fail. Providing training without mandate → knowledge unused. Providing platforms without budget for promotion → tools invisible. Providing mandate without infrastructure → implementation impossible. Successful practitioners in these regions confirm that all five success factors must be present together (administrative capacity, infrastructure, mandate, cultural shift, financial mechanisms). Emerging regions require comprehensive foundational support addressing all five gaps simultaneously, not sequential or isolated interventions.
- **Developing Regions (Flanders, Lund):** Developing regions have moved past foundational barriers but face implementation challenges. Key barriers include definitional clarity issues (Flanders 48%), role ambiguity regarding who is responsible for social procurement (Lund 52%), and monitoring capacity gaps (45-48%). The pattern reveals that tools and frameworks exist

in these regions, but they need refinement and clearer operational guidance. The focus should be on simplification, coordination, and making existing infrastructure more effective rather than building from scratch.

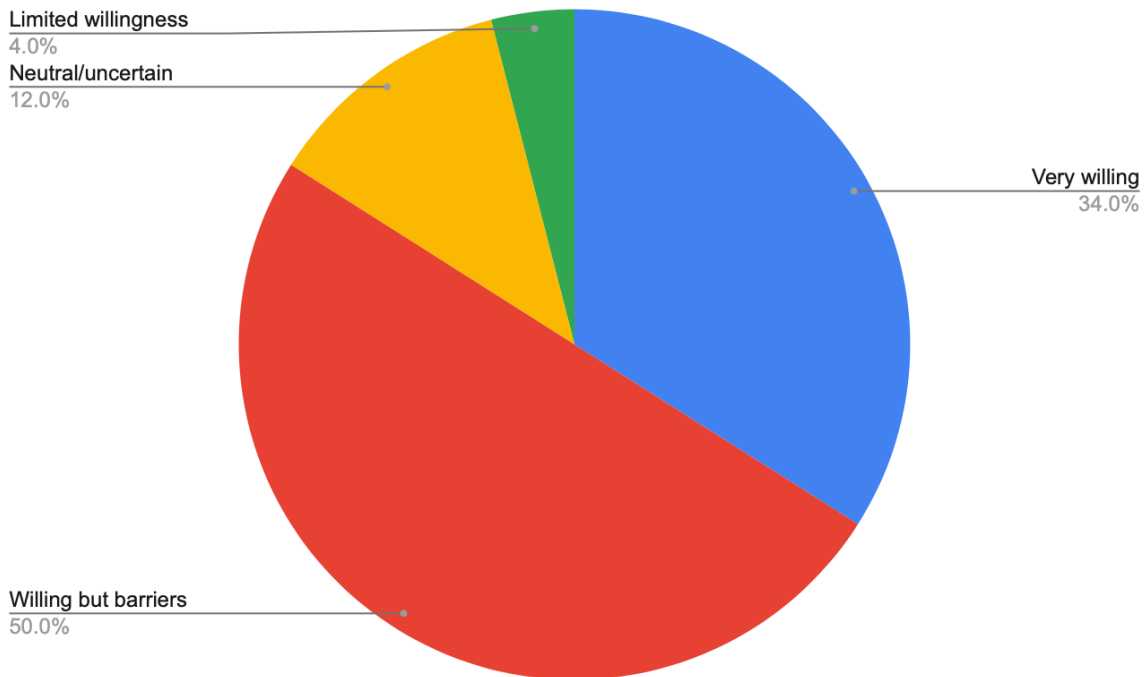
- **Advanced Region (Turin, Amsterdam):** Turin and Amsterdam face operational and scaling barriers rather than foundational gaps. Despite systematic implementation and documented outcomes, remaining barriers include persistent prejudice against social enterprises (Turin: 35% cite concerns despite evidence), resource constraints for monitoring and scaling support, and challenges extending proven municipal models to broader geographic areas. Both regions lack dedicated helpdesks to support replication in other municipalities. Focus should be on evidence dissemination to address misconceptions, infrastructure sustainability (monitoring capacity, scaling support), and systematic geographic expansion rather than basic infrastructure building.

### The "Willing But Unable" Paradox

**The survey asked:** "Would you be willing to include more social criteria in procurement if barriers were removed?"

### *Chart 4: Implementation Readiness*

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**Critical Finding: 84% are willing** (very willing + willing but barriers). The implementation gap is **not lack of willingness but lack of capacity and support**. Remove barriers → majority ready to engage.

The survey emphasizes this as the **"Willing But Unable" Paradox**—the implementation gap is NOT lack of willingness but rather lack of capacity and support infrastructure.

**Cross-Regional Summary: Barriers**

**Universal barriers** (present in 5-6 regions):

1. Limited awareness/expertise (60-75%)
2. Complex procedures perceived (48-58%)
3. No dedicated budgets (55-65%)
4. Lack of clear mandate (45-52%)

**Pattern:** Despite different contexts, **the same barriers appear everywhere**, suggesting **transferable solutions** are possible.

**Barrier evolution by maturity:**

- **Emerging:** Awareness → "Don't know it exists"
- **Developing:** Complexity → "Don't know how to do it"
- **Advanced:** Quality → "How to do it better and scale"

## 4.5. Perceived Enablers

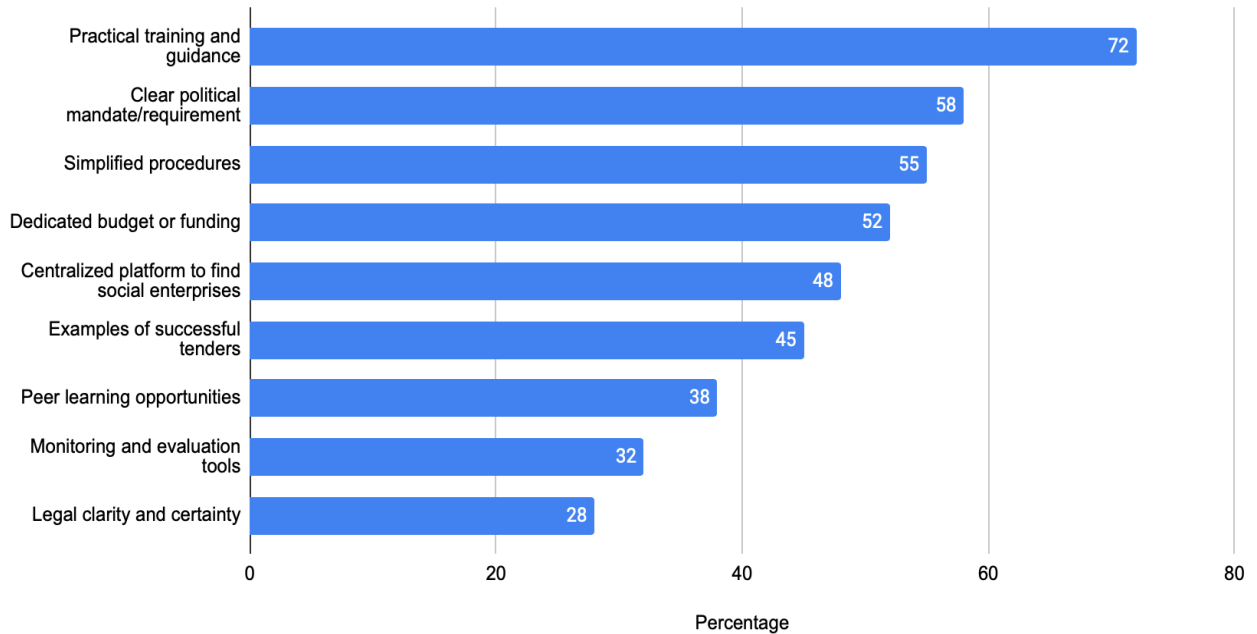
**Overall finding:** Clear support needs identified; successful practitioners rely on informal enablers

### Support Needs Identified

Respondents were asked: "What would most help your organization increase social procurement?" (Select top 3 priorities)

### *Chart 5: Prospective Enablers*

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**Key Findings:**

**Training dominates (72%)**—confirms knowledge gap as primary barrier. But training alone is insufficient—**58% want a clear mandate**, showing need for obligation not just education. **Simplification (55%)** and **dedicated budgets (52%)** round out top 4—addressing complexity and resource barriers identified in Section 3.4.

**Platform needs (48%)** and **examples (45%)** reflect information infrastructure gaps—even where tools exist (Turin's Buy Social, Belgium's doeners.be), many unaware (Section 3.2). **Peer learning (38%)** valued more than formal training—aligns with finding that informal networks are the current primary information source.

**Legal clarity ranks relatively low (28%)**—not because it is unimportant, but because **permission already exists**; practitioners need "how" not "whether."

**Regional Variation in Priorities**

**Table 10: Top Priorities by Region**

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Region	#1 Priority	#2 Priority	#3 Priority	Pattern
Turin	Monitoring (80%)	Simplification (70%)	SE capacity (60%)	Optimisation
Flanders	Simplification (84%)	Legal clarity (56%)	Coordination (52%)	Refinement
Romania	Training (80%)	Clear mandate (70%)	Guidelines (65%)	Capacity + mandate
Lund	Clear roles (70%)	Training (70%)	Simplification (60%)	Ambiguity
Central Greece	Framework (90%)	Training (80%)	Commitment (60%)	Structure first
Kranj	Training (75%)	Mandate (70%)	Platform (65%)	Foundational
Amsterdam	Simplification (67%)	Coordination (67%)	Databases (67%)	Implementation
Oliveira	Guidelines (62%)	Training (54%)	Simplification (46%)	Foundational

**Pattern by Maturity:**

- **Emerging** (Kranj, Central Greece): No infrastructure—need everything—training, mandate, platform, examples
- **Developing** (Flanders, Lund, Romania, Oliveira): Tools/frameworks exist but confusing—need clarity, simplification, mandate
- **Advanced** (Turin, Amsterdam): Need quality improvement—monitoring, capacity, scaling

## Enablers Among Successful Practitioners

Among respondents who currently apply social procurement successfully (n=28, primarily from Italy, Belgium, some Romania):

### What Enabled Their Success?

- 68% credit political leadership—but Section 3.4 showed 52% lack clear mandate
- 61% credit peer networks—but these are informal, not institutionalised
- 57% credit dedicated time—but 58% cite time constraints as barrier
- 54% credit training—but 72% say they need it (most haven't received it)

**Gap:** What works for successful practitioners is precisely what's missing for those not yet implementing. This validates the barrier analysis and points to clear solutions.

### The Role of Informal Networks

**How successful practitioners learned about social procurement:** Successful practitioners rely much more heavily on informal networks (+24-29 percentage points) than average respondents. Government websites are barely more useful for successful practitioners (+3%).

**Implication:** Informal networks are the actual enabling infrastructure—not official channels. Recommendations must either formalise these networks OR make official channels work more like them (peer-based, practical, relationship-driven).

### Willingness to Support Others

The survey asked successful practitioners: "Would you be willing to share your experience with other authorities/organisations?"

#### Responses:

- **Yes, very willing:** 82%

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- **Yes, if time/resources available:** 14%
- **Maybe:** 4%
- **No:** 0%

**Total willing:** 96%

**Implication: Peer learning potential is enormous**—practitioners want to help each other, resources are available. Just needs organisation/facilitation (addresses 38% wanting peer learning opportunities).

**Universal needs (wanted across all 8 regions):**

1. Training (72% overall, 70-80% in most regions)
2. Clear mandate (58% overall, especially emerging regions)
3. Simplification (55%, especially where tools already exist)
4. Dedicated budgets (52%, universal resource constraint)

**What successful practitioners show works:**

1. Political leadership commitment (68% credit this)
2. Peer networks (61%)—currently informal, could be formalised
3. Dedicated staff time (57%)—requires budget/mandate
4. Training (54%)—but practical, not theoretical
5. Social enterprise partnerships (50%)—relationship-building matters

**The Enabler-Barrier Mirror:** Every major barrier has corresponding enabler:

- Barrier: Knowledge gap (68%) → Enabler: Training (72%)
- Barrier: No mandate (52%) → Enabler: Clear requirement (58%)
- Barrier: Time constraints (58%) → Enabler: Dedicated staff time (57% among successful)
- Barrier: Can't find SEs (72% don't know where) → Enabler: Central platform (48%)

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- Barrier: Legal uncertainty (48%) → Enabler: Legal clarity (28%—but permission exists, need "how" not "whether")

**Key Takeaway:** Enablers are known and achievable—the 28 successful practitioners surveyed prove they work. The challenge is removing barriers for the 84% willing but currently blocked. What successful practitioners have (political commitment, peer networks, dedicated time, training) is precisely what the majority lack. Closing this gap may unlock implementation potential across all 8 regions.

**Critical Insight**

Survey quantifies what desk research suggested: **Permission without support infrastructure = minimal uptake**

All regions CAN do social procurement (legal) → Few DO social procurement (15-25% application) → Not due to unwillingness (84% willing) → Due to **missing implementation infrastructure** (training, budgets, platforms, monitoring, mandates where voluntary fails)

## 5. Focus Group Discussion Findings

Focus group discussions were conducted between July and September 2025 across all 8 PROSECO partner regions. Sessions were designed to:

- **Move from "what" to "why":** Deepen understanding of barriers beyond survey statistics
- **Test assumptions** from desk research against lived practitioner experience
- **Reveal root causes** of the implementation gap between legal permission and systematic practice

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- **Identify working solutions** already being applied locally that could be scaled
- **Co-develop recommendations** through multi-stakeholder dialogue

All sessions used a common thematic framework with four core discussion areas: **Visibility & Awareness, Leadership & Administration, Finance & Resources, Institutional Barriers & Enablers.**

*Table 11: Focus Group Participation*

REGION	PARTICIPANTS	Authorities	Subsidised Organisation	Social Economy	Regular Economy
BSC Kranj	10	3	2	3	2
Region of Central Greece	3	1	0	1	1
Province Flemish Brabant	11	9	0	1	1
ADV Romania	10	2	2	4	2
City of Turin / TSI	11	3	3	2	1
Lund Municipality	21	7	4	6	3
City of Amsterdam	7	2	0	1	4
Oliveira de Azeméis Municipality	9	1	2	2	0
<b>TOTAL</b>	<b>82</b>	<b>38</b>	<b>13</b>	<b>20</b>	<b>14</b>

**Key Observations**

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- **82 total participants** across 8 regions
- **Authorities: 46%** (38/82) — demand-side perspective well-covered
- **Social Economy: 24%** (20/82) — supply-side voice balanced
- **Regular Economy: 17%** (14/82) — competitive perspective included; notably strong in Sweden (33%) and Netherlands (57%)
- **Subsidised Organisations: 16%** (13/82) — insights from existing ecosystem
- **Note:** Greece (n=3) and Portugal (n=9) smaller due to summer holidays and late participation; findings are exploratory

**Triangulation Explained:** Permission exists everywhere → Infrastructure exists in some places → Systematic practice exists only where mandate + infrastructure + support align → Solutions transferable

**Table 12: What Triangulation Showed**

Survey Found	Desk Research Showed	Focus Groups Explained
84% willing but only 15-25% implementing	Permission exists in all 8 countries (EU Directives 2014/24 & 25)	Voluntary frameworks permitting but not requiring; no supporting infrastructure; no urgency without mandate
48-70% lack awareness despite tools existing	Tools exist in multiple regions (doeners.be, Regulation 307, platforms)	Dissemination failure; formal channels ineffective; informal networks (58%) outperform official channels (22%)
45-52% cite legal uncertainty across all stakeholder types	Frameworks documented in all regions	Systemic communication failure, not audience-specific knowledge gap; if rules unclear to everyone, problem is the system
Barriers consistent across 8 countries	Legal/institutional barriers documented	Systemic/institutional barriers, not context-specific; transferable solutions possible with adaptation

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Employment outcomes: 40% (Italy) vs 10-12% (other regions)	Regulation 307 (binding mandate and basic monitoring) produces documented results (2,074 placements). TSI provides separate voluntary ecosystem support.	Turin has mandate + infrastructure + support; others have permission only; combination approach essential
72% don't know where to find SEs	Platforms exist (doeners.be, Buy Social, etc.)	Infrastructure exists; visibility/access problem; needs dissemination and user awareness
58% learned through peers vs. 22% government	Informal networks documented across regions	Peer networks are actual working infrastructure; formal channels not matching practitioner needs

## 5.1. Root Causes: From “Barriers” to “Why”

Focus groups moved beyond the survey's barrier identification to reveal systemic root causes and practitioner-identified solutions.

### The Knowledge-Practice Gap Explained

Survey findings showed 48-70% lack awareness, 84% are willing, yet only 15-25% are implementing. Focus groups revealed the barrier is not "people don't know" but rather "permission without mandate creates no urgency." Authorities view social procurement as optional good practice, not a requirement. Without a binding directive, other priorities crowd it out. Informal networks compensate for the absence of formal infrastructure, but this is unsustainable long-term.

## The Complexity Barrier: Systemic, Not Accidental

Survey findings showed 40-84% cite "complex procedures." Focus groups revealed that fragmented institutional response creates this complexity on three levels. Operational complexity (48%) exists because procurement procedures are genuinely complicated and authorities lack simplified tools. Definitional complexity (40%) stems from no shared understanding of what counts as "social procurement," with different authorities applying different criteria. Coordination complexity (35%) arises when multiple actors—procurement, HR, social affairs, finance—have no shared responsibility, creating bottlenecks. The root cause is not procedural difficulty but fragmented institutional response with no centralized support infrastructure.

## Resource Constraints Are Real, But Structural

Survey findings showed 52% cite budget constraints and 65% of authorities cite time pressure. Focus groups revealed this is not absolute scarcity but misalignment of budget responsibility. Procurement budgets don't include social goals; social budgets don't fund procurement. Time pressure is real for authorities who "add on" social procurement without dedicated staff. Where dedicated staff exist within public administrations (Turin, parts of Belgium), time pressure is significantly lower than in contexts where social procurement is added to existing workloads without dedicated capacity.

A critical insight from Belgium's focus group reframes the budgeting challenge entirely: "The real key enabler for both companies and governments to aim for more social impact lies in consciously managing large purchases, not in increasing the CSR budget." This shifts social procurement from a charity/additional-investment framing to a strategic procurement management challenge using existing funds. Public procurement represents 14% of EU GDP—billions already being spent. The barrier is not funding scarcity but intentional redirection of existing procurement spend. When budgets remain compartmentalized, no reallocation occurs. When

strategic procurement management is mandated, existing funds flow toward social outcomes without new money.

### **Informal Networks Outperform Official Channels (58% vs. 22%)**

Survey findings showed practitioners learn from peers (58%) far more than from government websites (22%). Focus groups revealed that official channels provide rules, not guidance, while informal networks provide practical "how-to," real examples, and relationship-based learning. Trust in peers exceeds trust in government communications. The problem is that informal networks are unsustainable long-term as they depend on voluntary effort from social enterprises.

Critical finding: Dissemination failure is the primary barrier. Multiple regions (Belgium, Sweden, Romania) have invested in infrastructure—platforms, tools, guidance materials—yet 48-72% of practitioners remain unaware these exist. This is not a tool innovation problem; it is a visibility and dissemination problem. Belgium's doeners.be platform, MVOO criteria tool, and Antwerp peer review model exemplify "gold standard" infrastructure that practitioners consistently cite as effective, yet 48% of Belgian respondents report low awareness despite tool availability. The infrastructure exists but is invisible because official communication strategies have failed. The solution is not to build new tools but to deploy effective dissemination through channels practitioners actually use.

### **Project-Dependency Is Structural, Not Accidental**

Survey and focus group findings from Slovenia, Greece, and Romania show "without EU projects, most wouldn't attempt this." When EU project funding ends, practice stops—not just because money disappears, but because knowledge and commitment disappear. This indicates no institutional commitment; practice remains grafted on, not integrated. There is no permanent institutional infrastructure; practice is entirely dependent on external validation.

### **Cost Is NOT the Real Barrier (Surprising Finding)**

Survey findings showed 55% cite cost concerns about social enterprises. Focus groups revealed that when social enterprises can compete fairly—with pre-financing available, bidding support provided, and fair evaluation criteria—cost concerns disappear. The cost concern finding reveals a critical insight: when procurement officers cite "social enterprises cost more," they are not identifying an actual cost problem but rather signalling systemic disadvantage that manifests as price. Focus groups repeatedly demonstrated that when conditions level the playing field through advance payments, fair evaluation criteria, mentoring during bid preparation, and transparent scoring, social enterprises prove price-competitive. Cost concern thus serves as a proxy for systemic barriers (lack of pre-financing capacity, unfair procurement procedures, and bias). This reframes the policy response: rather than negotiating lower prices from social enterprises (which undermines their sustainability), policy should address the underlying structural disadvantages. Solutions focus on payment term restructuring, capacity-building support, and procurement procedure reform—not price reduction.

## 5.2. Cross-Regional Summary: Root Causes to Solutions

### The Core Implementation Problem

The survey showed 84% willing but only 15-25% systematically implementing—a 50%+ gap. Focus groups revealed the gap is not a motivation problem (willingness is high); the gap is a systems problem. Five critical gaps simultaneously prevent implementation despite legal permission existing: missing mandate (permissive vs. binding), missing infrastructure (training, platforms, guidance, monitoring), missing resources (budget, pre-financing, support costs), missing cultural readiness (fear, prejudice, lowest-price mentality), and missing institutional structures (permanent staff, coordination, accountability).

### Five-Factor Success Model (From Focus Group Consensus)

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Practitioners identified what enables successful implementation where it does happen. The model includes five interconnected factors:

- **Administrative capacity** includes trained procurement officers, clear procedures, simplified monitoring, and dedicated staff roles.
- **Support infrastructure** includes central helpdesk, criteria databases, template clauses, impact measurement frameworks, and digital platforms.
- **Organisational policy** includes a clear mandate (binding where possible), staff incentives, designated ownership, and regular review.
- **Cultural shift** includes moving beyond the lowest-price mentality, building trust through successful examples, regular peer dialogue, and recognising social enterprises as reliable partners.
- **Financial mechanisms** include specific budget lines, pre-financing support for social enterprises, recognition of support costs, and incentive structures.

**Critical finding:** Successful practitioners cite all five factors together—not any single factor. Turin achieves this combination; other regions have 2-3 factors but not all five.

**Table 13: Regions Performance in the Five-Factor Success Model**

Region	Administrative Capacity	Infrastructure	Policy/Mandate	Cultural Shift	Financial Mechanisms	Primary Gaps	Recommendation Priority
<b>Turin (Advanced)</b>	High: Trained officers, clear procedures, dedicated staff	Strong: TSI ecosystem, Buy Social platform, monitoring systems	Binding: Regulation 307 (3% mandate)	Moderate: Some prejudice persists (35%)	Present: Dedicated budget lines (however, not sufficient for sustainability)	Quality improvement, improving monitoring systems, scaling to smaller municipalities	Focus on evidence campaigns, prejudice elimination, expand budget and improve monitoring systems

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<b>Flanders (Developing)</b>	Moderate: Provincial directors, recurring training	Present: doeners.be, MVOO tool, model clauses, Antwerp peer reviews	Permissive only: Article 15 allows but doesn't require	Emerging: 48% unaware despite tools	Partial: No dedicated budget line	Dissemination failure, mandate gap	Communication campaign, formalize peer learning, binding targets
<b>Amsterdam (Advanced)</b>	High: BSR institutional structure, 5 lead buyers	Strong: WIZZR monitoring, integrated ecosystem, €203M coordination	Institutional: BSR mandate (non-legislati ve)	Moderate: Established but not universal	Strong: €203M annual budget	Scaling beyond Amsterdam	Formalise success factors, share BSR model nationally, municipal targets
<b>Romania (Developing)</b>	Low: ANAP working group established 2025	Emerging: ADV advocacy networks, no digital platform	Pending: 0.5% Senate-appr oved, awaiting final passage	Emerging: 80% willing, high engagement	Missing: No budget allocation	All infrastructure gaps, mandate finalization	Support legislative passage, establish hubs, SE capacity building
<b>Lund (Developing)</b>	Low: Cross-functional groups, voluntary municipal action	Minimal: Informal networks (Skoop,) Famna, Coompanion )	Permissive: Strategic framework non-binding (2025 roadmap emerging)	Emerging: 70% willing, confidence- building needed	Missing: No dedicated budget	Mandate clarity, permanent infrastructure	Start Small pilots, peer learning, municipal targets
<b>Central Greece (Emerging)</b>	Very Low: Project-depende nt only	Absent: FEAD partnerships only, no permanent platform	Permissive: Basic framework unused	Unfamiliar: 2.6/5 awareness, 40% very limited knowledge	Missing: EU project funding only	All five factors simultaneously present	Awareness campaigns, simple pilot, establish hub with EU co-financing

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<b>Kranj (Emerging)</b>	Very Low: 73% EU project dependent	Absent: Project-base d infrastructure only	Permissive: Framework unused	Very Unfamiliar: 2.3/5 awareness, 70% lack detailed knowledge	Missing: External funding dependency	All five factors simultaneously present (barrier stack)	Break project dependency, establish permanent hub, peer learning with Greece
<b>Oliveira (Emerging- Developing)</b>	Low: Porto Metro coordination nascent	Minimal: No centralized platform	Permissive: Legal anxiety rather than prohibition	Emerging: Growing interest, Porto Metro initiative	Missing: No budget line	Legal confidence, coordination structures	Address legal anxiety, Porto Metro pilot, formalize existing practices

**Pattern by Implementation Maturity**

The Five-Factor Success Model table reveals clear progression patterns across regions. Analysis of which factors are present—and critically, which are absent—explains why implementation differs so dramatically despite universal legal permission.

**Emerging regions** (Kranj, Central Greece) demonstrate 0-1 success factors present, facing simultaneous foundational barriers: practitioners "don't know it exists," combined with resource scarcity and cultural unfamiliarity with social procurement concepts. These regions require foundational infrastructure building starting with awareness campaigns using simple, recognisable examples, often leveraging EU project funding to establish initial practice. The challenge is not legal permission (which exists) but complete absence of enabling conditions.

**Developing regions** (Flanders, Lund, Romania, Oliveira) show 2-3 success factors present but face implementation barriers: practitioners "don't know how to do it," complicated by procedural complexity and unclear mandates about who is responsible. These regions have moved past awareness; tools and frameworks exist

but need refinement. The priority shifts to simplification of existing procedures, targeted training on practical application, improved coordination across departments, and clearer requirements establishing who must act. The gap is not knowledge of existence but operational clarity.

**Advanced implementation** (Turin, Amsterdam) demonstrates a more complete presence of success factors than other regions—both have systematic mechanisms producing documented outcomes at scale. However, **these regions achieve systematic results through different models:**

**Turin model:** Binding municipal mandate + supporting ecosystem

**Amsterdam model:** Institutional coordination + comprehensive infrastructure

**Advanced regions' barriers** differ in character, not absence—the focus includes optimisation, scaling, and strengthening sustainability rather than establishing basic permission to practice. Advanced implementation means 'comparatively ahead' with systematic outcomes, not 'challenges resolved.' The distinction is that Turin and Amsterdam can build on functioning frameworks and proven results, while emerging regions must first establish infrastructure and enabling conditions.

**This maturity progression reveals a critical insight:** interventions must match regional readiness. Providing training to emerging regions without first building awareness fails; providing mandate to developing regions without simplification creates compliance burden; providing additional infrastructure to advanced regions when cultural barriers remain wastes resources. Effective policy recommendations require diagnosing current maturity level and addressing the specific gaps that prevent progression to the next stage.

### 5.3. Working Solutions: What Practitioners Say Works

Moving from diagnosis to solution, focus group discussions revealed four proven implementation models currently working across different regional contexts. Unlike theoretical frameworks, these models represent actual practice—approaches that practitioners identify as effective, sustainable, and potentially transferable. Each model addresses different combinations of the five success factors identified in Section 5.2, making them applicable at different maturity levels.

**Table 14: Proven Implementation Models**

Model	Location	Core Mechanism	Evidence of Success	Transferability
Binding Mandate + Support	Turin	Regulation 307: Mandatory 3% allocation + City monitoring (basic system, 1 staff) + voluntary TSI ecosystem coordination	2,074 placements 2020-23 (67% women)	High - requires municipal/regional legislative authority + basic support infrastructure
Institutional Coordination + Infrastructure	Amsterdam	BSR coordination + €203M budget + WIZZR monitoring + 5 lead buyers	930 contracts managed; €203M annual value	High - requires institutional commitment + budget allocation + coordination capacity
Platform + Tools + Peer Support	Belgium (Flanders)	doeners.be platform + MVOO tool + model clauses + Antwerp peer reviews	Good uptake in engaged municipalities (Antwerp); 48% unaware despite tools	Medium - requires digital infrastructure + provincial coordination + ongoing dissemination

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Civil Society Advocacy + Legislative Momentum	Romania	ADV networks + ANAP working group + 0.5% Senate-approved mandate (pending final passage)	80% willing; legislative window open; emerging practice	Medium - requires strong civil society + political momentum + capacity building for implementation
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**Model Details**

Following Table 14's four proven implementation models, this section details how each approach works and conditions for transferability:

**Model 1: Binding Mandate + Support Infrastructure (Turin)**

**Core mechanism:** Regulation 307 mandates 3% annual procurement allocation for disadvantaged employment. City monitoring office (1 dedicated staff) tracks implementation through a basic but functioning system with gender-disaggregated data. Voluntary ecosystem coordination through TSI provides awareness-raising, Buy Social platform (150+ enterprises), and B2B activities.

**Why it works:**

- Removes "should we?" question; mandate creates obligation not option
- Basic monitoring enables accountability and outcome documentation
- Voluntary ecosystem support (TSI) complements mandatory framework without requiring institutional integration
- Long-term commitment (operational since 2005) builds practitioner confidence

Key success factors: Binding requirement + basic functioning monitoring + documented outcomes (2,074 placements 2020-23, 67% women) = systematic results despite resource constraints

**Transferability:** High for regions with municipal/regional legislative authority. Requires political will for binding target + minimal dedicated monitoring capacity (even 1 staff sufficient to start). Voluntary ecosystem support is helpful but not a prerequisite for mandate success.

### ***Model 2: Institutional Coordination + Comprehensive Infrastructure (Amsterdam)***

**Core mechanism:** Bureau Social Return (BSR) provides institutional coordination across €203M annual budget and 930 contracts. WIZZR monitoring system integrates with university research partnerships. Five lead buyers coordinate cross-departmental implementation without legislative mandate—institutional commitment substitutes for binding percentage requirement.

#### **Why it works:**

- Dedicated institutional structure creates systematic coordination
- Substantial budget allocation (€203M) enables scale
- WIZZR monitoring provides sophisticated data and feedback loops
- Cross-departmental integration prevents siloed implementation
- Proves institutional coordination can achieve systematic results without binding mandate

**Key success factors:** Strong institutional commitment + dedicated coordination unit (BSR) + substantial budget + sophisticated monitoring = systematic results through coordination rather than obligation

**Transferability:** High for regions with budget availability and capacity for institutional coordination. Requires sustained political support and funding. Offers alternative pathways for contexts where binding mandates face political/legal barriers. Lower legislative risk than mandatory percentages.

### **Model 3: Platform + Tools + Peer Support (Flanders)**

**Core mechanism:** doeners.be digital platform provides centralized templates, supplier databases, and guidance. MVOO tool offers criteria selection support. Antwerp peer review model facilitates practitioner-to-practitioner learning through structured quarterly sessions. Provincial coordination ensures consistency, but 48% awareness gap indicates dissemination challenges.

**Why it works:**

- Solves "where to find SEs?" problem (72% cite this barrier across regions)
- Reduces complexity through standardized templates and model clauses
- Peer credibility higher than expert/government guidance
- Relationship-based learning more effective than formal training
- Digital infrastructure enables 24/7 access to resources

**Key success factors:** Comprehensive tools + provincial coordination + peer learning structures = good uptake where awareness exists; dissemination failure (not tool failure) limits broader impact

**Transferability:** Very high—digital platforms easily replicated; Belgium actively sharing doeners.be model. However, requires ongoing dissemination investment + provincial/regional coordination capacity. Tools alone are insufficient without awareness campaigns and formalized peer networks.

**Model 4: Civil Society Advocacy + Legislative Momentum (Romania)**

**Core mechanism:** ADV Romania coordinates between authorities, social enterprises, and training providers through advocacy and working groups. ANAP working group (established 2025) develops a national action plan. Senate approved 0.5% procurement mandate (2024, awaiting Chamber passage). Civil society drives legislative change rather than government-led reform.

**Why it works:**

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- Bridges authority-SE gap through dedicated intermediary coordination
- Builds momentum through collective stakeholder action
- Demonstrates bottom-up pathway: civil society advocacy → legislative commitment
- High practitioner willingness (80%) ready for mandate implementation
- Government partnership (ANAP working group) formalizes civil society role

**Key success factors:** Strong civil society mobilization + political window opportunity + high stakeholder engagement = legislative momentum; implementation infrastructure needed once mandate passes

Transferability: Medium—requires a strong, organized civil society sector willing to lead advocacy. Demonstrates a viable pathway for contexts where the government is reluctant to initiate reform. Legislative timeline longer (18-24 months minimum) but potentially sustainable once institutionalized. Capacity building is critical during transition from advocacy to implementation phase.

**Cross-Model Insights**

These four models demonstrate multiple pathways to systematic implementation rather than single prescriptive approach:

- Turin + Amsterdam: Both achieve "Advanced" status through different mechanisms—binding mandate vs. institutional coordination. Choice depends on political feasibility and resource availability.
- Flanders + Romania: Both "Developing" but through different strengths—Belgium has tools but dissemination gaps; Romania has momentum but needs implementation infrastructure.

**Sequencing matters:** Regions should match models to maturity level. Emerging regions benefit from Belgium's platform approach or Romania's graduated advocacy. Developing regions can adopt Turin's mandate or Amsterdam's coordination. Advanced regions need optimization and scaling strategies.

**Models are complementary, not exclusive:** Successful regions often combine elements (Turin: mandate + voluntary ecosystem; Amsterdam: coordination + budget + monitoring). Strategic sequencing creates pathways from emerging practice to systematic implementation.

## 5.4. Key Practitioner Messages for Policymakers

**Survey Finding:** 84% willing, 15-25% implementing

**Focus Group Finding:** Gap is not due to unwillingness or lack of legal permission. The gap is institutional—missing mandate, infrastructure, resources, and coordination. All five factors must be addressed; partial approaches fail.

**Practitioner Quote:** "We can do this, and we want to do this. We know it's legally possible. What we need is clarity that it's REQUIRED, infrastructure to make it EASY, and resources to make it SUSTAINABLE."

**What it shows:** The problem is not capability or willingness. The problem is systemic infrastructure and mandate. Solutions are actionable within 12-24 months if resources and political will present.

### Permission Exists; Mandate Doesn't

**Survey Finding:** All 8 regions have legal frameworks permitting social procurement

**Focus Group Finding:** Legal permission is necessary but not sufficient. Italy's binding requirement (Regulation 307) achieves 4x the implementation of Belgium's permissive approach. Permission creates possibility; mandate creates practice.

**Practitioner Quote:** "Don't make new policies; make existing ones work."

**What it shows:** Shift must be from legal frameworks to mandate + infrastructure. All regions can implement using existing permission; barrier is lack of binding requirement to drive action.

## Infrastructure Exists; Visibility Doesn't

**Survey Finding:** 72% don't know where to find social enterprises; 48% lack awareness of tools

**Focus Group Finding:** Platforms (doeners.be, Buy Social, etc.) exist and work. The problem is dissemination and user awareness, not tool quality. Infrastructure exists but is invisible to practitioners who need it.

**Practitioner Quote:** "Tools exist but nobody knows about them. Government passive; informal networks active."

**What it shows:** Solution already exists; needs visibility campaign and integration into official channels. Not an innovation problem; dissemination problem.

## Informal Networks Are the Actual Infrastructure

**Survey Finding:** 58% learn from peers vs. 22% from government websites

**Focus Group Finding:** Peer networks are not supplementary; they're the working infrastructure. Practitioners trust peers more than official channels. Official systems failing to serve the audience.

**Practitioner Quote:** "The government website tells us rules. Peer networks tell us how to actually do it."

**What it shows:** Rather than replace informal networks, formalize them. Make official channels work more like peer networks—practical, relationship-driven, immediately applicable.

## Cost Concerns Disappear When Barriers Removed

**Survey Finding:** 55% cite cost as barrier to social enterprise procurement

**Focus Group Finding:** When level playing field exists (pre-financing, fair evaluation, no prejudice), cost concern vanishes. Cost is a proxy for "can't compete fairly," not actual cost problem.

**Practitioner Quote:** "Cost only matters when the playing field isn't level. When SEs can bid fairly, cost becomes a competitive advantage, not a barrier."

**What it shows:** Cost concern signals systemic disadvantage, not real cost issue. Focus should be on fair competition infrastructure, not cost reduction.

### **Project Dependency Signals Lack of Institutional Commitment**

**Survey Finding:** Romania, Greece, Slovenia rely heavily on EU projects

**Focus Group Finding:** When a project ends, practice stops. Indicates no institutional embedding. Practice remains external, dependent on project funding for legitimacy.

**Practitioner Quote:** "Without EU projects, most wouldn't attempt this. When funding ends, the practice ends. We need permanent infrastructure, not project-based support."

**What it shows:** Emerging regions need institutional integration, not more projects. Recommendations must focus on permanent capacity, not time-limited funding.

### **Universal Barriers Point to Transferable Solutions**

**Survey Finding:** Barriers (complexity, awareness, mandate, resources) appear consistently across all 8 countries despite different contexts

**Focus Group Finding:** Universal barriers indicate systemic problems, not context-specific issues. Solutions that work in one region can transfer to others with adaptation.

**Practitioner Quote:** "We all face the same barriers. The solutions don't need to be different—they need to be adapted to our context, but the core is the same everywhere."

**What it shows:** Successful models (Turin, Belgium, Romania) can inform recommendations for all 8 regions. No region needs to reinvent; all can learn from working examples.

## 6. Policy Recommendations for Action

Research across desk analysis, survey (**111 respondents across 8 regions**), and focus groups (**82 participants**) reveals a consistent implementation gap: social procurement is legally possible everywhere but systematically practiced almost nowhere. Four root causes emerge from the evidence:

1. **Information inaccessibility** - tools exist but practitioners don't know about them; formal channels underperforming
2. **Mandate gap** - political goals don't translate to operational requirements
3. **Resource constraints** - implementation support, SE capacity building, and recognition of inclusion costs unfunded
4. **Support vacuum** - limited infrastructure bridging legal permission and actual practice

Recommendations are organised by implementation maturity level, recognising that regions face different barriers depending on their current position. Each recommendation indicates its evidence base to support regional adaptation.

### 6.1 Quick Wins by Regional Maturity: Actionable Within 12 Months

#### FOR EMERGING REGIONS (Greece, Slovenia, Portugal)

**Evidence context:** 0-1 success factors present; Section 4.3 shows all five barriers present simultaneously; Focus Group Theme 1 identifies "don't know it exists" as primary barrier

### **Recommendation 1a: Launch "Social Procurement Works" Campaign**

**Evidence base:** Survey Section 4.2: Greece 2.6/5 awareness, Slovenia 2.3/5; Focus Group Slovenia: "Without EU projects, most wouldn't attempt this"; Desk Research Section 5.1: 48-72% unaware existing tools despite infrastructure availability

**Strategic direction:** Communication initiatives showcasing successful social procurement examples can address misconceptions through practical case studies. Evidence suggests practitioners respond to peer success stories and myth-busting materials more effectively than technical documentation. Channels should align with how practitioners actually learn—municipal networks, peer exchanges, and regional forums rather than solely official websites (which reach only 22% of practitioners per Survey Section 4.4).

**Regional adaptation considerations:** Greece could leverage FEAD networks across administrative units; Slovenia's BSC Kranj could lead while addressing EU project dependency narrative; Portugal has opportunity to clarify legal permission directly, addressing documented legal anxiety.

### **Recommendation 1b: Develop "Start Small" Toolkit**

**Evidence base:** Focus Group Sweden: "Do something we already recognize first"; Survey Section 4.3: 48-58% cite complexity as barrier; Section 4.2: 84% willing but only 15-25% implementing (50-60 percentage point gap)

**Strategic direction:** Graduated implementation approaches that enable authorities to begin with familiar procurement categories build confidence and reduce perceived risk. Evidence suggests starting with widely-used services (cleaning 72%, catering 45%) allows learning at a manageable scale. Connection to existing European

platforms (doeners.be, Buy Social) provides model clauses and proven approaches rather than requiring local development from scratch.

**Implementation considerations:** Pilot support in select municipalities with documented outcomes builds regional confidence. Simple monitoring frameworks and accessible support contacts address complexity concerns while enabling practice to spread organically.

## FOR DEVELOPING REGIONS (Belgium, Sweden, Romania)

**Evidence context:** 2-3 success factors present; Section 4.3 shows barriers shift to "don't know how to do it" + unclear mandate; infrastructure exists but underutilised

### Recommendation 2a: Graduated Implementation Support

Developing regions benefit from the same graduated approach as emerging regions (Recommendation 1b), adapted to their context. Belgium's existing infrastructure (doeners.be, MVOO) provides foundation but 48% practitioner unawareness indicates dissemination gaps. Sweden's municipal readiness allows building on Lund's graduated approach. Romania's ADV networks can coordinate pilots. Amsterdam's BSR model offers proof of concept for broader application.

### Recommendation 2b: Formalise Peer Learning Networks

**Evidence base:** Survey Section 4.4: 58% learn from informal networks vs. 22% government websites; 96% successful practitioners willing to mentor; Focus Group Theme 5: "Peer credibility high"; Desk Research: Antwerp peer review model cited as effective

**Strategic direction:** Informal networks currently compensate for absent official systems (Survey Section 4.4). Rather than replacing these networks, formalising what already works makes it sustainable and scalable. Structured communities of

practice can facilitate practitioner-to-practitioner learning while maintaining the relationship-driven character that makes peer networks effective. Cross-regional connections (e.g., Slovenia-Greece pairing at similar maturity) enable shared learning.

**Regional options:** Belgium could formalise the Antwerp model and expand; Sweden could leverage existing Skoopi/Famna/Coompanion networks; Romania could structure ADV Romania's informal networks.

### FOR ADVANCED REGIONS (Turin, Amsterdam)

**Evidence context:** All 5 success factors present; barriers = optimization + scaling + sustainability rather than foundational gaps. Turin model: binding mandate + basic infrastructure. Amsterdam model: institutional coordination + comprehensive infrastructure. **Shared challenge: scaling proven municipal models regionally/nationally.**

### Recommendation 3a: Evidence-Based Communications + Implementation Support Infrastructure

#### **Evidence base:**

- Turin: 35% cite prejudice despite 2,074 placements; perception gap persists
- Amsterdam: BSR success (€203M, 930 contracts) lacks national visibility
- Both lack dedicated helpdesks for scaling: Turin's City monitoring office (1 staff) cannot support metropolitan municipalities; Amsterdam's BSR lacks formalised national support function

#### **Strategic direction:**

**Communications:** Data-driven showcasing addresses misconceptions. Turin: annual impact reporting (employment, costs, quality). Amsterdam: BSR

documentation for replication roadmap. Cross-learning: mandate evidence (Turin) + coordination evidence (Amsterdam) = complementary models.

**Implementation support:** Establish dedicated helpdesks:

- **Turin:** Municipal helpdesk providing Regulation 307 guidance, templates, training, coordination between monitoring/procurement, interface with TSI ecosystem
- **Amsterdam:** National helpdesk within/alongside BSR providing adaptation guidance, WIZZR implementation support, institutional frameworks, peer learning facilitation

Formalises support currently absent, enabling scaling through proven pathways.

### **Recommendation 3b: Monitoring Sustainability + Cross-Region Learning**

**Evidence base:** Turin: gender-disaggregated tracking but 1-staff capacity insufficient for scaling. Amsterdam: WIZZR sophisticated but limited to Amsterdam city. Both need capacity expansion; developing regions cite monitoring gaps.

**Strategic direction:**

- **Sustainability:** Turin needs additional staff for metropolitan expansion; Amsterdam needs WIZZR scaling capacity
- **Knowledge exchange:** Turin ← Amsterdam (WIZZR methodology, research partnerships); Amsterdam ← Turin (gender disaggregation, low-resource strategies)
- **Transferable frameworks:** Simplified monitoring (Turin's basic approach) for resource-constrained contexts; comprehensive monitoring (WIZZR) for well-resourced contexts
- **Collaboration:** Joint framework development enables mutual learning between different systematic approaches

### Recommendation 3c: Regional/National Scaling

**Evidence base:** Turin achieves 2,074 placements in the City but metropolitan municipalities lack guidance. Amsterdam manages €203M through BSR but other Dutch cities lack equivalent infrastructure.

**Strategic direction:**

- **Turin:** Leverage municipal helpdesk for metropolitan area scaling; Metropolitan Plan 2030 operationalization; target 3-5 metro municipalities with binding requirements within 24 months
- **Amsterdam:** Phase 1: BSR replication in major cities (Rotterdam, The Hague, Utrecht); Phase 2: adapted model for mid-sized municipalities; Phase 3: national coordination framework; target 2-3 cities with BSR structures within 24 months
- **Cross-learning:** Binding mandate model (Turin) suits regions with legislative authority + limited budgets. Institutional coordination model (Amsterdam) suits regions with budget availability + limited legislative authority. Both achieve systematic results—regions choose based on context.

## 6.2 Foundational Infrastructure: 12-24 Month Development

### Recommendation 4: Comprehensive Training Programs

**Evidence base:** Survey Section 4.4: 72% want training (highest-ranked need); Focus Group Theme 2: "Training needed but must be practical, not theoretical"; Survey Section 4.3: 58% cite time constraints, 52% lack clear mandate

**Strategic direction:** Multi-tiered training addressing differentiated stakeholder needs. Evidence indicates training alone is insufficient—must be practical and paired with mandate clarity and time allocation. Procurement officers require technical competence (tender design, evaluation, monitoring). Leadership needs strategic understanding (business case, budget allocation, mandate implementation). Social enterprises need tender readiness support. Train-the-trainer approaches build regional capacity for sustainable delivery rather than dependence on external expertise.

### **Recommendation 5: Establish Regional Hubs**

**Evidence base:** Survey Section 4.4: 72% don't know where to find SEs; 65% cite lack of central information source; Focus Group Theme 4: "Need one-stop shop"; Desk Research: Turin's TSI, Belgium's doeners.be, Amsterdam's BSR demonstrate hub effectiveness

**Strategic direction:** Centralised coordination points reduce practitioner burden of navigating fragmented information. Hub functions adapt to regional maturity—emerging regions may start with information platforms and SE databases, while developing regions can add helpdesk services and peer matching. Digital infrastructure enabling 24/7 access complements human support for relationship-based learning. Connection to European networks prevents duplication and enables knowledge transfer.

### **Recommendation 6: Social Enterprise Capacity Building**

**Evidence base:** Survey Section 4.3: 52% SEs never participated in procurement; Focus Group Theme 3: "SEs need pre-financing and bid preparation support"; Survey Section 4.4: 55% cite cost concerns (Focus Groups reveal these are structural barriers, not actual cost issues)

**Strategic direction:** Supply-side strengthening addresses structural disadvantages. Tender readiness programs, business mentoring, and quality certification increase

competitive capacity. Pre-financing mechanisms or payment term restructuring address cash flow constraints that disadvantage smaller enterprises. Recognition that employing disadvantaged workers involves supervision, training, and adapted arrangements informs realistic pricing expectations and prevents "race to bottom" exclusion.

### **Recommendation 7: Integrated Monitoring Systems**

**Evidence base:** Desk Research Section 3.4: Turin and Amsterdam demonstrate systematic monitoring; Survey Section 4.3: 45-48% cite monitoring capacity gaps; Focus Group Section 5.2: Monitoring enables accountability and evidence building

**Strategic direction:** Monitoring systems serve dual purposes: accountability for implementation targets and evidence generation demonstrating social outcomes. Simple frameworks reduce compliance burden while capturing essential data. Integration with existing procurement systems minimizes additional work. Standardized metrics enable cross-regional comparison and learning. Gender-disaggregated and intersectional data (Turin model) provides richer understanding of inclusion outcomes.

### **Recommendation 8: Dedicated Resource Allocation**

**Evidence base:** Focus Group Belgium: "The real key enabler lies in consciously managing large purchases, not in increasing CSR budget"; Survey Section 4.3: 52% cite budget constraints (Focus Groups reveal this is misalignment, not scarcity); Desk Research Section 5.1: Turin and Amsterdam budget support infrastructure

**Strategic direction:** Sustainable implementation requires permanent resource allocation rather than project-based funding. Public procurement represents 14% of EU GDP—strategic redirection of existing spend rather than additional budgets. Resource needs include implementation support (Recommendation 5 hubs), training delivery (Recommendation 4), SE capacity building (Recommendation 6), and monitoring systems (Recommendation 7). Phased approaches allow initial EU

co-financing transitioning to institutionalised budget lines, reducing project dependency that undermines sustainability.

## 6.3 Structural Change: Long-Term Consideration (24+ months)

### Recommendation 9: Consider Binding Targets or Mandates Where Voluntary Approaches Prove Insufficient

**Evidence base:** Focus Group Romania: "Until authorities have binding obligations, they will not take the necessary steps"; Desk Research Section 3.4: Turin (3% binding) achieves 2,074 placements vs. voluntary regions with sporadic uptake; Survey Section 4.4: 58% want clear mandate; Survey Section 4.3: 84% willing but only 15-25% implementing—50+ percentage point gap

**Strategic direction:** Where legal permission alone proves insufficient despite willing practitioners, regions may consider moving from permissive to mandatory frameworks. Evidence strongly suggests mandates must be paired with support infrastructure (Recommendations 4-8)—obligation without capacity creates compliance burden. Modest starting points (0.5-1% of procurement value) with gradual increases over multi-year periods allow capacity building. Flexibility in implementation (authorities choosing mix of reserved contracts and social clauses) accommodates local contexts.



**Legislative pathways vary:** National procurement law amendment (18-24 months, universal application); regional/provincial regulation where competence exists (12-18 months, faster adaptation); municipal policy through council resolution (6-12 months, creates demonstration models). Alternative pathway involves municipal-level adoption in pioneering cities demonstrating viability before regional/national scaling—lower initial risk with proof of concept.

**Regional context considerations:** Romania has legislative window (0.5% Senate-approved); Belgium, Italy, Sweden have provincial/municipal competence enabling regional approaches; Netherlands' BSR institutional model offers alternative to national change; Greece, Slovenia, Portugal may prioritise infrastructure building (Recommendations 4-8) before mandate consideration.

## 6.4 Region-Specific Priority Sequencing

Each region faces different barriers depending on maturity level. Evidence-based prioritization suggests:

**Table 15: Regional Implementation Priorities**

Region	Maturity	Current State	Priority 1	Priority 2	Priority 3	Rationale
 Turin	Advanced	Regulation 307 operational (3% mandate); 2,074 placements documented	Rec 3a: Evidence campaigns + municipal helpdesk	Rec 3b: Monitoring sustainability + capacity	Rec 3c: Metropolitan scaling strategy	Address prejudice through data; formalise implementation support; strengthen monitoring capacity; scale up and extend
 Flanders	Developing	doeners.be platform established; provincial coordination; survey: 48% unaware	Rec 1a: Communication campaign	Rec 2b: Formalise peer model	Rec 5: Enhance hub	Dissemination failure, not tool failure

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Romania	Developing	0.5% mandate Senate-approved; ADV advocacy active; awaiting implementation	Rec 1b: Start small toolkit	Rec 2b: Formalize ADV networks	Rec 9: Support mandate passage	Legislative window + strong mobilization
Lund	Developing	Oct 2025 national roadmap; no binding requirements; survey: 70% willing	Rec 1b: Start small pilot	Rec 4: Training + capacity building	Rec 2b: Peer learning network	Build capacity first; leverage roadmap momentum; start with familiar sectors
Central Greece	Emerging	Project-dependent; low awareness (2.6/5); foundational gaps	Rec 1a: Awareness campaign	Rec 1b: Simple pilot (1 municipality)	Rec 4: Training (30-40 officers)	Foundational stage
Kranj	Emerging	Project-dependent; lowest awareness (2.3/5); no permanent structures	Rec 1b: Break project dependency	Rec 2b: Regional peer community	Rec 5: Simple hub	Peer learning with Central Greece
Amsterdam	Advanced	BSR established; €203M invested; WIZZR monitoring; systematic implementation documented	Rec 3a: Evidence campaigns + national helpdesk	Rec 3b: WIZZR expansion + cross-region learning	Rec 3c: National scaling (major cities)	Scale successful model nationally Formalize BSR replication support; expand WIZZR to other cities; build national inter-municipal coordination
Oliveira	Emerging-Developing	Legal framework exists; confidence gap; Porto Metro interest growing	Rec 1a: Address legal anxiety	Rec 1b: Porto Metro pilot (17 municipalities)	Rec 5: Hub for coordination	Formalize existing practices

**Implementation Note:** Regional contexts, legal competencies, and political environments vary significantly. These recommendations are evidence-based suggestions for consideration and adaptation, not prescriptive requirements. PROSECO partners are best positioned to determine feasibility, sequencing, and approach within their specific contexts.

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