



*Enhancing VET for social impact: putting
social public procurement into practice*

Training Module 3 Analysis of SE needs

Bucovina Institute, Romania



EUROPEAN CENTER
FOR SOCIAL FINANCE



ΠΑΝΕΠΙΣΤΗΜΙΟ
ΔΥΤΙΚΗΣ ΑΤΤΙΚΗΣ
UNIVERSITY OF WEST ATTICA



MALTAVOCATIONAL®



CHAMBER OF COMMERCE
AND INDUSTRY VRATSA



TPCT
Consulting & Events



**Co-funded by
the European Union**

Deal4Good is funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Education and Culture Executive Agency (EACEA). Neither the European Union nor EACEA can be held responsible for them. Project number: 2024-1-DE02-KA220-VET-000244401



Learning Objectives

- Define what a Social Enterprise (SE) is.
- Identify and categorize the main types of needs SEs face.
- Recognize how factors (growth stage, sector, geography, legal form) influence SE needs.
- Relate SE needs to Social Public Procurement (SPP) opportunities.



Definition of a Social Enterprise

A Social Enterprise (SE):

- Pursues a social or environmental mission.
- Generates income through economic activity.
- Reinvests profits into achieving its mission.
- Operates with transparency and participatory governance.

Examples:

- Work Integration SEs
- Fair trade or ethical production companies
- Community cooperatives and social innovation ventures



Common Need Categories of Social Enterprises

Category	Description	Examples / Typical Needs
Strategic Needs	Related to long-term direction, leadership, and governance.	Clear mission, strategic planning, governance models, leadership training.
Operational Needs	Day-to-day management and systems.	HR capacity, logistics, IT systems, process optimization.
Financial Needs	Ensuring financial sustainability and stability.	Access to funding, cash flow management, investment readiness.
Market Needs	Building customer base and external partnerships.	Marketing, sales channels, distribution networks, contract opportunities.
Impact Measurement Needs	Demonstrating and communicating social value.	Data collection tools, indicators, monitoring systems, impact reports.

1. Introduction to Social Enterprise Needs

Deal4GOOD



Factors Influencing Social Enterprise Needs

Factor	Explanation
Growth Stage	Start-ups may need capacity building and finance; mature SEs may focus on scaling and partnerships.
Sector	Needs differ by focus area (e.g., environment, health, education, inclusion).
Geography	Local context, infrastructure, and policy environments shape access to resources.
Legal Form	Cooperatives, associations, and limited companies face different compliance and funding frameworks.



Co-funded by
the European Union

1. Introduction to Social Enterprise Needs



Group Activities

Activity 1: Group Discussion – “Spot the Social Enterprise”

Learners identify examples of SEs in their country. Discuss how they combine social mission and business activities.



1. Introduction to Social Enterprise Needs



Group Activities

Activity 2: Case Study – “Understanding SE Needs”

Present a short case of a real or fictional SE.

Learners map out its needs using the five categories.



Co-funded by
the European Union



Group Activities

Activity 3: Reflection

Learners reflect on how understanding SE needs helps contracting authorities and procurement professionals design more inclusive tenders.



Assessment

Group presentation: Each group presents one SE and its main needs.

Reflection journal: How SE needs influence their ability to participate in SPP.



Effective needs identification is both **analytical and participatory** — combining data, dialogue, and diagnostic tools to help social enterprises grow stronger and become better equipped for social public procurement.

Learning Objectives

- Apply **diagnostic frameworks** (e.g., SWOT, Business Model Canvas) to analyze SE needs.
- Use **data collection methods** (qualitative and quantitative) for SE diagnostics.
- Employ **analytical tools** to interpret and prioritize identified needs.
- Conduct a **mini needs assessment** using a real or sample SE profile.



Overview

Purpose: Equip participants with practical tools for SE diagnostics.

Structure:

1. Diagnostic Approaches
2. Data Collection Techniques
3. Analytical Tools



Diagnostic Approaches

Approach	Purpose	Key Tool / Example
Needs Assessment	Identify gaps and areas for support	SWOT, Business Model Canvas
Gap Analysis	Compare current vs desired performance	Gap Analysis Matrix
Stakeholder Mapping	Identify key actors influencing SE needs	Power–Interest Grid



Example Frameworks

Strengths

Weaknesses

Opportunities

Threats



Data Collection Techniques

Technique	When to Use	Outputs
Interviews & Focus Groups	Deep qualitative insight	Quotes, themes
Surveys & Questionnaires	Quantitative diagnostics	Data tables, averages
Observations & Audits	On-site verification	Checklists, ratings
Secondary Data	Historical/comparative data	Reports, financials

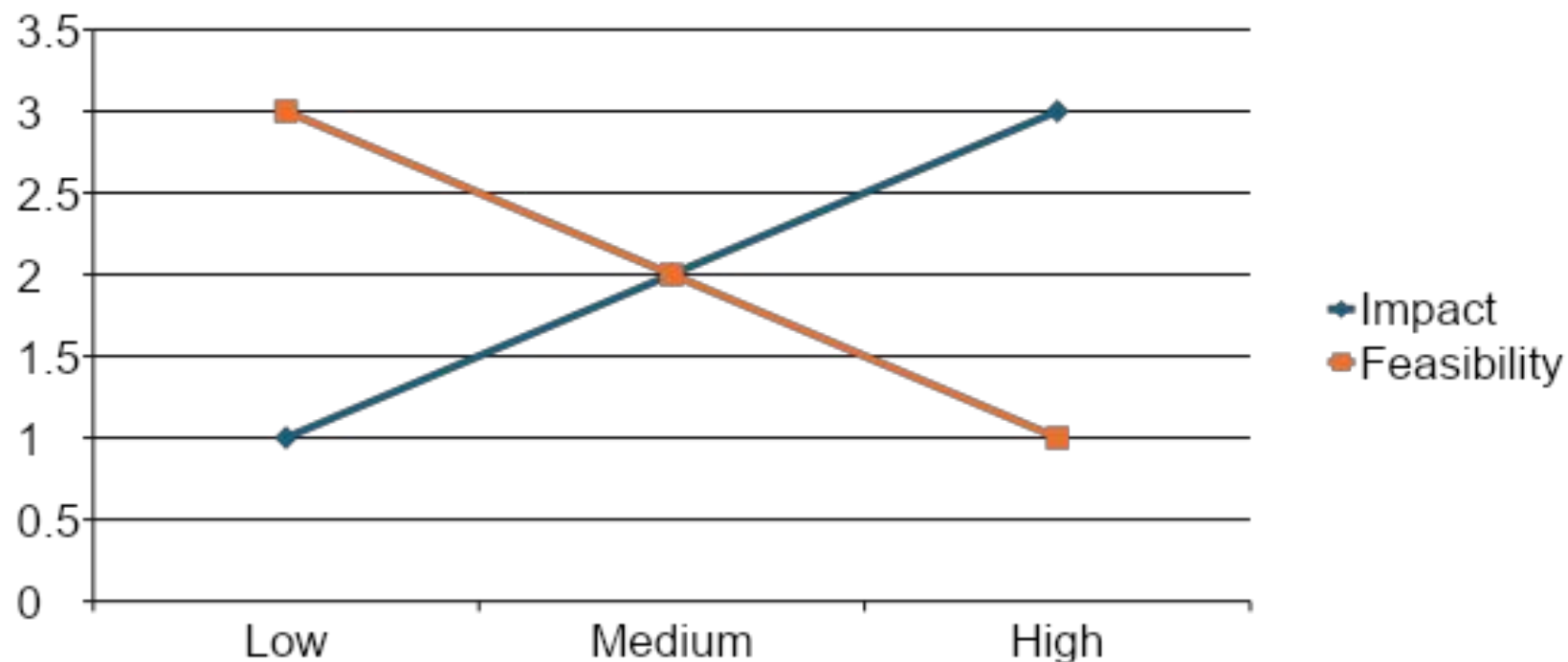


Analytical Tools

Tool	Description	Use Case
Thematic Analysis	Identifying recurring issues from qualitative data.	Synthesizing interview and focus group insights
Scoring/Ranking Methods	Prioritizing needs based on urgency, importance, or cost.	Weighted scoring or ranking scales
Prioritization Matrix	Mapping needs by impact and feasibility.	Impact vs. Feasibility Grid



Analytical Tools – Impact vs Feasibility Matrix





Practical Exercise – SE Needs Assessment

Participants work in small groups using a sample SE profile.

- Conduct a quick **SWOT or Gap Analysis**.
- Identify 5–7 key needs.
- Rank them using an **Impact–Feasibility Matrix**.
- Present results briefly to the group.

Expected Output:

A visual summary of the SE's priority needs and possible support actions.

Example Output Table

Category	Identified Need	Priority (1–3)	Impact	Feasibility
Financial	Access to working capital	1	High	Medium
Operational	HR training for staff	2	Medium	High



Linking SE needs to procurement opportunities bridges **capacity and opportunity**. By understanding the procurement ecosystem, mapping capabilities, and addressing readiness gaps, social enterprises can unlock sustainable growth and maximize social impact through public and private contracts.

Learning Objectives

- Explain the **procurement ecosystem** and its relevance for social enterprises.
- Apply **matching techniques** to align SE needs and capacities with procurement opportunities.
- Assess **market readiness** and identify actions to improve SE procurement participation.
- Develop a simple **readiness improvement plan** for a social enterprise.

Understanding Procurement Ecosystems

Topic	Description	Relevance to SEs
Public Procurement	Government and local authority tenders, often with social clauses.	Opportunities for SEs to deliver social value.
Private Procurement	Corporate supply chains seeking responsible sourcing.	Expands SE market access beyond public contracts.
Social Procurement	Integrating social value into purchasing decisions.	Core mechanism for achieving SPP goals.
Procurement Criteria	Cost, quality, sustainability, and social value used to evaluate bids.	SEs can highlight their social impact as a differentiator.
Supplier Diversity Policies	Encourage inclusion of SMEs, social enterprises, and minority suppliers.	Support SE visibility and fairness in supply chains.

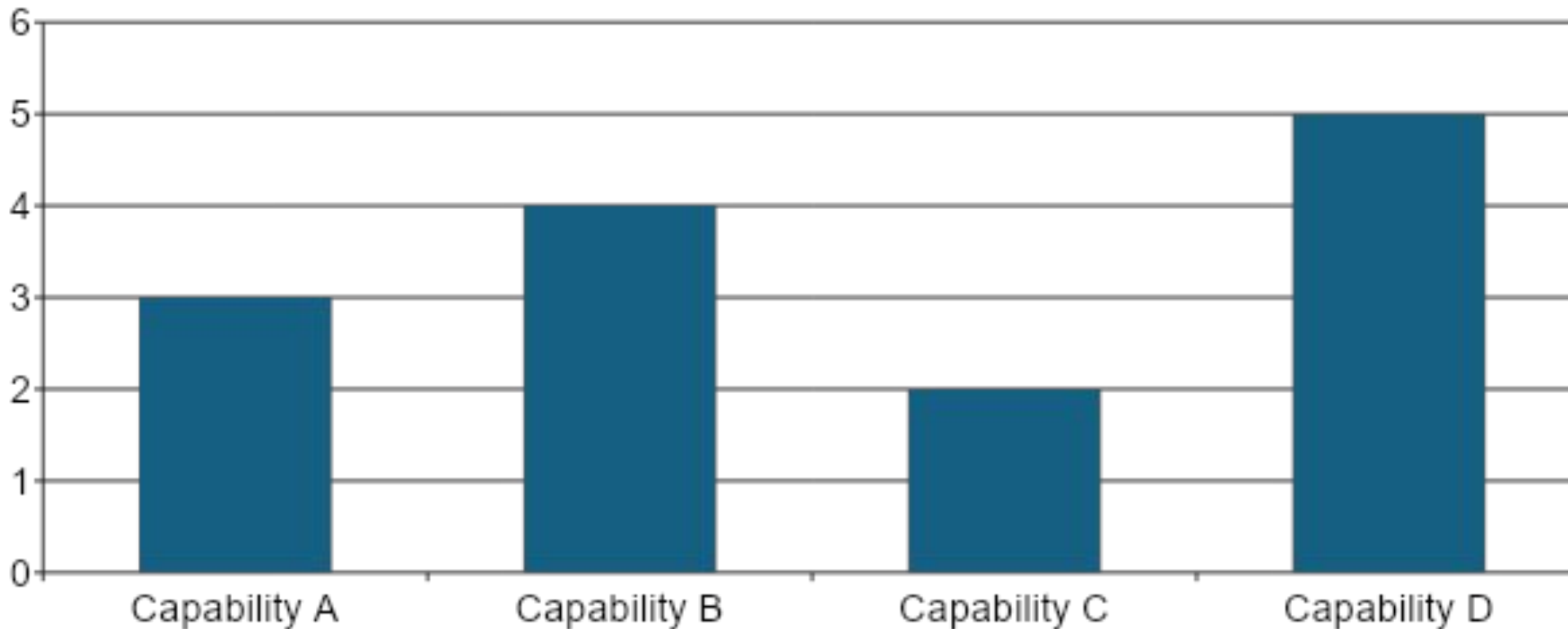
Matching Techniques

Technique	Purpose	Examples / Tools
Capability Mapping	Identify SE strengths vs. buyer requirements.	Skills inventory, capacity checklists.
Procurement Databases / Portals	Find tenders or supply opportunities.	TED (EU), local portals, corporate supplier databases.
Market Readiness Assessment	Evaluate SE's operational and compliance readiness.	Readiness scorecards, questionnaires.
Fit-Gap Analysis	Identify gaps between SE offerings and buyer expectations.	Gap matrices, alignment diagrams.



Fit-Gap Analysis Example

Fit-Gap Analysis: SE Capabilities vs Buyer Needs



Building Capacity for Procurement

Focus Area	How SEs Can Improve	Practical Tools
Certifications & Standards	Obtain ISO, B Corp, or Fair Trade certifications.	ISO 9001, SA8000.
Quality & Compliance	Strengthen documentation and legal readiness.	Procurement compliance checklist.
Value Proposition Packaging	Communicate SE value effectively to buyers.	Social Value Statement template.

Practical Exercise

Title: *“Match and Prepare” – Linking SEs to Procurement Opportunities*

Task:

Participants work in small groups to:

- Review a **sample SE profile** and a **procurement opportunity** (e.g., a municipal service contract).
- Conduct a **fit-gap analysis** to identify alignment and missing capabilities.
- Develop a short **readiness improvement plan**, including actions (certification, partnerships, capacity building).

Output:

A one-page summary of SE–procurement match and improvement recommendations.



Real-world examples show that social enterprises can succeed in procurement when their **needs are aligned with opportunities** through planning, partnerships, and evidence of social value. This session empowers participants to translate theory into actionable strategies for inclusive growth.

Learning Objectives

- Analyze **real examples** of social enterprises successfully integrated into procurement chains.
- Identify **key success factors and challenges** in SE–procurement collaborations.
- Apply previous learning to develop an individualized **Needs-to-Opportunity Action Plan** for a real or hypothetical SE.
- Formulate **specific steps and partnerships** to strengthen SE participation in procurement markets.



Case Studies of Successful SE Procurement Integration

Case Study	Context	Key Success Factors
Case 1: Work Integration SE (Local Government Contract)	A cooperative providing cleaning services under a social inclusion clause.	Clear social value reporting, compliance readiness, collaboration with local authority.
Case 2: Environmental SE (Corporate Supply Chain)	Green enterprise supplying recycled packaging to a major retailer.	Quality certification, strong value proposition, scalability.
Case 3: Social Innovation SE (Public-Private Partnership)	SE delivering digital inclusion training under an EU-funded program.	Co-creation with public agency, innovation, measurable impact indicators.



Case Studies of Successful SE Procurement Integration

Discussion prompts:

- . What strategies made each SE successful?
- . What were the main barriers faced, and how were they overcome?
- . How did partnerships and procurement frameworks support success?



Action Planning Template – From Needs to Opportunity Map

A practical tool for applying the previous sessions' learnings.

Step	Description	Example
1. Identify Needs	Based on SE's diagnostic or assessment.	Limited bidding experience, no certification.
2. Define Opportunities	Link needs to procurement pathways.	Local authority cleaning tender.
3. Set Objectives	Define short- and medium-term goals.	Obtain ISO certification; build capacity.
4. Identify Actions & Resources	Define steps, partners, responsibilities.	Partner with Chamber of Commerce for training.
5. Track Progress	Establish indicators and review frequency.	Quarterly progress review.



Activity – Needs-to-Opportunity Action Plan

1. Choose a social enterprise you support or represent.
2. Use the template to:
 - Summarize main SE needs.
 - Identify procurement opportunities.
 - Define actionable steps for improvement.
3. Exchange drafts for peer feedback.

Output: Personalized Action Plan ready for refinement.





Group Discussion: What Worked, What Didn't, and Why

Participants reflect on the lessons learned from the case studies.

Guiding Questions:

- Which internal factors (leadership, planning, resources) contributed most to success?
- Which external factors (policy, buyer attitudes, market conditions) played a role?
- How can these lessons inform the participants' own SE strategies?



QUIZZ

Feedback forms