Title: ToShare: Addressing technological transformations: exploring and sharing knowledge to co-create a Strategy for a diverse, inclusive, sustainable and smart Europe

TECHNICAL ANNEX: SECTIONS 1-3

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1. EXCELLENCE

Preamble

The fourth industrial revolution brings with it a battery of technological changes that affects, the productive environment, and also the cultural, social, economic, educational, relational and regulatory environments. From the project "ToShare" we understand that- under the premises that shape the current paradigm, adaptation to change will only be possible through adjustments in all these different aspects. This can guarantee that the industrial revolution 4.0 will generate economic growth and social welfare in an environment of equality, equity and sustainability. Since gender inequalities are widely documented, a critical gender perspective is indispensable to deepen knowledge and inspire inclusive and gender-sensitive future scenarios for men and women.

Despite the Declaration of Human Rights and the successive international agreements recognizing the fundamental rights of all human beings, more and more people suffer from poverty, inequality and exclusion. For example, 1% of population own 50% of wealth[1], with disparities in average wealth identified across and within countries. Specifically, women and young people are more likely to live in poverty and social exclusion than men[2].

Reality shows that there has been an increase in production and wealth derived from new technologies that would make it possible to meet all the economic needs of human beings, yet these benefits are still poorly distributed, and held by very few people. Although new technologies are the result of investment in infrastructures made by public institutions and, therefore, their financing is with the contribution of all, often their benefits are not shared equally. Thus, the economy is not always governed focused on the needs of society and people. This means an enormous missed opportunity to share the benefits of technological changes across society.

1.1 *Objectives*

Therefore, the central objective of the project is to ***define a strategy that contributes to the development of an inclusive and sustainable socio-economic model, adaptive to the changes of the fourth industrial revolution.***

In terms of specific objectives these would focus on four key pillars, which are considered the basis of this new economic and social model:

1. **A Social and solidarity economy**: an economy that serves the needs of the community and each one of its members in their diversity, paying special attention to social and solidarity economy companies and enterprises, and the benefits derived from them, including gender equality.
2. **The Redistribution of wealth** (taxation, spending priorities, social protection[3]): the wealth obtained must be distributed fairly, with access to a complete system of social protection. This might include an unconditional and universal basic income system[4], providing security and ensuring freedom for every person to make their own choices, while ensuring gender equality and community cohesion.
3. **Full development of people through work and employment:** reorganization and distribution of employment and work (productive and reproductive and voluntary) to ensure the full development of all citizens irrespective of their gender or any other social characteristic (age, migration status, disability, etc.)
4. **Achieve an inclusive and permanent education:** currently there is an inverse correlation between the speed at which new technologies are developed, their impact on society and the time that people need to adapt to changes. It is thus necessary to question the current educational and instructional model. These changes, impacts and social adaptation require an education throughout life that provides people with skills and values, and which prioritises human well-being and makes them capable to be a driving part of evolutions in the content and organization of work and employment. Special attention will be placed on the presence and performance of men and women in their educational and professional itineraries.

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[1] Credit Suisse (2017) Global Wealth Report 2017; Research Institute; November.

[2] In Europe, in 2015, women were more likely to experience poverty or social exclusion than men by 1.4 percentage points. For both men and women, young people aged 18 to 24 were the most likely to be at risk of poverty or social exclusion. (Source: http://ec.europa.eu/eurostat/statistics-explained/index.php/Europe_2020_indicators_-_poverty_and_social_exclusion#Main_statistical_findings)

[3] The case for a basic citizenship income Report1 Committee on Social Affairs, Health and Sustainable Development Rapporteur: Ms Nunzia CATALFO, Italy, Members not belonging to a Political Group. (Source: Link)

[4] Votes on texts and amendments in the Parliamentary Assembly of Europe.The case for a basic citizenship income (Doc. 14462) (Source: Link)

Table 1.1: ToShare Operational Objectives and Measurable Indicators and Targets

ToShare OBJECTIVE	INDICATOR
Objective 1: SOCIAL AND SOLIDARITY ECONOMY	
To identify and share good practices in relation to social and solidarity economy	Report on shared practices identified and described
ToShare good practices in relation to social and solidarity economy	3 Policy briefs on the solidarity economy with examples from cases around Europe 6 public actions across participating countries to document social and solidarity economy experiences carried out throughout Europe
To explore how social and solidarity economy companies respond in a better way to the needs identified within local communities	Database on shared practices identified and described on how social and solidarity economy companies respond in a better way to the needs identified within local communities
To explore the reasons behind social and solidarity economy companies to promote a higher satisfaction within the work team/employees	Database shared practices identified and described on how social and solidarity economy companies promote a higher satisfaction within the work team/employees
To explore and identify drivers of social and solidarity economy companies to promote environmental and sustainable behaviours	Database shared practices identified and described on how social and solidarity economy companies can promote environmental and sustainable behaviours
To explore and identify drivers of social and solidarity economy companies to promote equality, including gender equality	Database shared practices identified and described on how social and solidarity economy companies can promote equality, including gender equality
To explore how public policies can support and promote the creation of social and solidarity economy companies	Database shared practices identified and described on how public policies promote the creation of social and solidarity economy companies
Objective 2: RE-DISTRIBUTION OF WEALTH	
To identify the wealth obtained due to new technologies	1 Manual on good fiscal practices, 1 Reference library on studies and communication to the different interest groups in Europe. 1 summary document as part of the Final Report: "Socioeconomic effects of technological transformations" Suggestions for indicators: 1 Database on wealth generated from new technologies
To propose fair distribution methods through a progressive tax system for Europe	5 Descriptor sheets on the different progressive tax systems in Europe characterised using the same standardised parameters
To identify potential transition periods needed based on to the reality of each European territory	3 transition pathway graphics for each European territory produced (based on case studies/countries involved)
To estimate the cost of social protection, including the concept of a Basic Income	1 Database including the costs of social protection which include basic income
To identify the impact of Basic Income experiences on the social welfare, including the reduction of working time and the reduction of poverty	Report on practices identified and described on how basic income can help to social protection and to combat the poverty
To examine examples to help reduce and prioritize social expenses that new technologies permit thanks to big data	Report on best practices identified and described on how on how new technology can help reduce/prioritise social investment
To study in more depth as a case study the reduction in pharmaceutical expenses through a policy that prioritizes health prevention and an individualized medical approach	1 case study developed for an individualised health prevention approach (cost reductions)

Objective 3: WORK-EMPLOYMENT	
To calculate the impact of new technologies on employment in each European territory	1 summary document as part of the Final Report: "Socioeconomic effects of technological transformations" Each scenario to be developed in WP4 will include an estimation of this impact, for countries considered in the project
To estimate the consequences of a reduction in working hours (division of employment) on employment	1 report document on the range of options being considered (when possible specify differences depending on the field of activity)
To estimate the consequences of a reduction in working hours (division of employment) on occupational safety and health	1 summary document on studies and estimates for Europe, as part of the Final Report: "Socioeconomic effects of technological transformations" 1 set of surveys with relevant stakeholders on consequences
To evaluate the potential benefits and drawbacks for the local community and citizens to include non-productive/reproductive work	1 Report on the pros and cons for the local communities to include non-productive/reproductive work based on our case studies
To identify good practices for these new approaches	1 reference document including all the main studies and secondary data 1 report on interviews results in the different European territories
Objective 4: EDUCATION AND SKILLS	
To identify ways of measuring new skills demand derived from technological transformations	Report shared practices identified and described
To explore and identify challenges of current education and training systems associated to the evolution of the labour market	1 summary document on these challenges as part of the Final Report: "Socioeconomic effects of technological transformations"
To evaluate the factors to promote an inclusive, democratic and permanent education	Database on shared practices factors identified and described

1.2 *Relation to the work programme*

"ToShare" has as central objective **to support gender responsive, inclusive and sustainable economic and social models consistent with the fourth industrial revolution,**

Thanks to research-based evidence insights from European wide data and comparative analysis. ToShare will develop **a robust European strategy to help ensure socially cohesive growth that guarantees: 1) the economic competitiveness of a well-paid work force ; 2) the benefit from sustainable quality of life and 3) that this is centred on human well-being and equality**.

Thus the project is specifically structured along **4 main pillars**, as illustrated by the following figure.

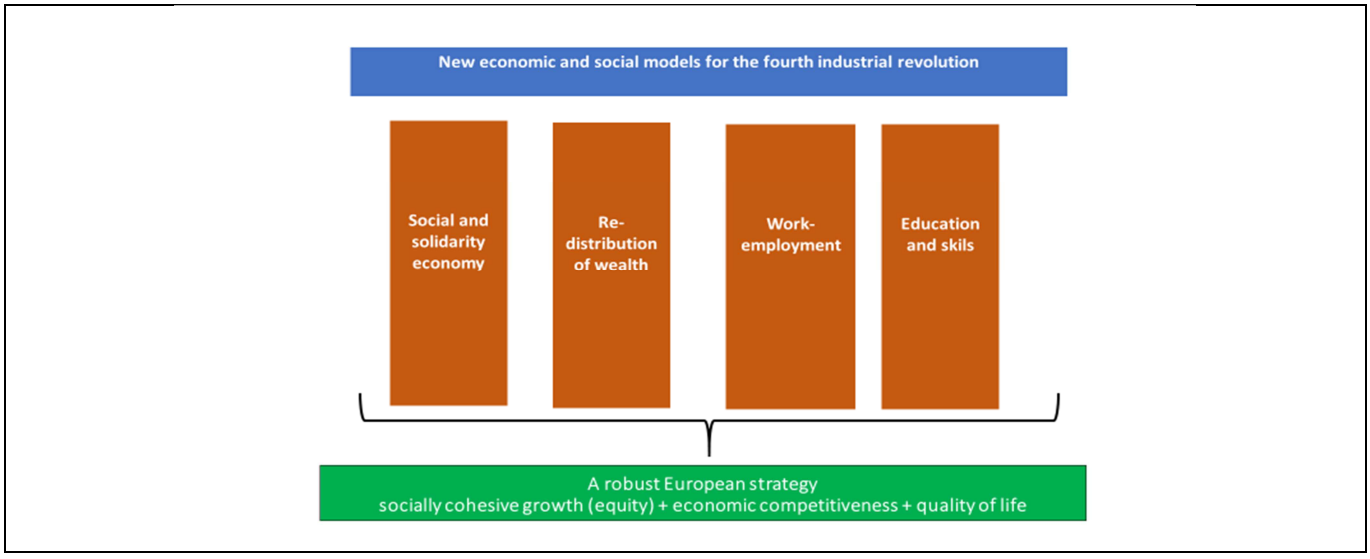

Figure 1.1. ToShare 4 main pillars and outcome (source: own elaboration)

In terms of challenges, the proposal **looks at technological transformations as a fundamental driver of change ("the fourth industrial revolution") to then derive research-driven policy responses.** It looks at the impact (and responses) on: 1) work and employment; 2) Social welfare aspects- redistribution of wealth and 3) education and Skills to come up with responses for socially inclusive growth, giving attention to the interface of platform economy and 4) the social and solidarity economy.

Table 1.2. and Table 1.3. specify how ToShare addresses the specific challenge and scope of the work programme.

Table 1.2.: ToShare relation to the Work Programme CHALLENGES

TOPIC: Inclusive growth:addressing the socioeconomic effects of technological transformations			
CHALLENGE		**ToShare APPROACH**	
Tech. impact	Socioeconomic effects of technological transformations Automation, robotisation and digitisation Research on effects of these changes	**Europe wide data and case studies**	ToShare has a **pan European approach** with the participation of 21 partners representing 9 countries in the Consortium. Innovative approach through the use and emphasis of knowledge from key European networks
Impact/ policy response: **Socially inclusive growth**	Proposals for socially inclusive growth policies and interventions-	**Social and solidarity economy**	ToShare will give special emphasis to **social and solidarity economy** as systemic responses to: a) environmental limitations of resources and planetary boundaries b) social needs and demands from diverse people living in Europe, which give strong priority to social cohesion, paying special attention to gender issues. ToShare will analyse new technologies from a social and solidarity economy perspective
Impact/ policy response: **Social welfare policies**	Occupational health and safety aspects Impacts on welfare systems and social security Impact on personal and social well-being Impact on distributive fairness.	**Redistribution of wealth**	ToShare will identify the opportunities that new technologies give to **generate more wealth** Also how new technologies can be used to **strengthen a European Social Protection System** (including a universal basic income) ToShare will analyse the potential b) may have more free time to develop jobs and activities that allow their personal development c) more compatible with care related responsibilities redistributing them between women and men.
Impact/ policy response: **Work and employment**	Opportunities and challenges for the future of work Employment and productivity Availability and type of jobs	**Work-employment**	ToShare will study the potential risk of the **reduction of the working day** as an opportunity for people a) to have more equal access to work ToShare will also evaluate the potential for favouring (or not) **more voluntary activities that increase the value of professional actions**, e.g. in the care of elderly or minors (an issue considering the ageing of European population and drop in birth rates) ToShare will identify and analyse gender inequalities in access to labour market, employment patterns and working conditions. It will also explore gender gaps in paid and unpaid work.

Impact/policy response: **Education and skills**	Impact on skills and their acquisition	**Inclusive and permanent education**	ToShare will look at the development of an **Inclusive education system** which incorporates new competencies e.g. better personal knowledge (physical and mental), which translates into a) a greater capacity for personal development and quality of life, b) greater equality between women and men and recognition of diversity c) better capacity to respond to community needs

Table 1.3.: ToShare´s relation to the Work Programme SCOPE

SCOPE		**Uptake in ToShare**
APPROACH	**Approach which is Europe-wide and comparative**	ToShare´s approach start from the history of the European Union demonstrates that despite a great territorial and social diversity **the EU has succeeded in generating a single market** thanks to a political will that has developed the **necessary legal and economic instruments**. Yet in the labour and social sphere, the **differences between and within the territories are great,** so an equal political will is needed to **move towards a cohesive and shared baseline.**
	Historical, comparative perspectives on how previous industrial revolutions impacted European societies	ToShare will analyze the impact of previous industrial revolutions from a gender perspective in **the different territories and society of Europe.** E.g. In Scotland, in the Basque country, in Eastern Europe, etc.
WORK EMPLOYMENT	**Rise of digital platforms and the platform economy in European countries**	ToShare will consider the ways in which the **new platforms could be regulated to help contribute to wealth creation**, and do not generate unfair competition. ToShare will identify, from a legal and legal point of view, the evolution of both employment and the labour market in the whole of Europe and its various States, analysing how the **lack of adequate common regulation,** which has resulted in very different situations. ToShare will also analyse the changes produced in the **content and organization of work methods, giving attention to problems with job instability, precariousness and social discontent and disconnect** for many people, paying special attention to the different situations of men and women. ToShare will provide **a model of the social and solidarity economy** that responds to the **social needs and demand for an inclusive society**. ToShare will also consider **different ways of organizing work where workers and employees** can also have **participation in the decisions made** in the organizations and companies. One major objective here will be to help break the "glass ceiling" for women in decision-making positions. ToShare will research whether the **motivation and participation of people in their own projects results in a**
	Look at employment and labour markets evolutions	
	In the content and organisation of work	
	Inclusive business models (e.g. social economy, social enterprises)	
	Human capital growth and productivity gains	

	Access to labour markets and social well-being.	**better attention to social needs** which also generates economic growth. ToShare will also analyse the **relationship between a universal basic income and the creation of new productive projects** ToShare will deepen knowledge into to what extent **a basic income and an adequate social protection system allows a reduction in the time of employment** and, therefore facilitates existence of free time and the **development of voluntary and unpaid work, trying to promote a fairer distribution of such work between women and men.** ToShare will consider whether **new technologies allow greater benefits in productivity** and an adequate distribution which in turn could favour the reduction of the working day which guarantees a **balance between working time and personal well-being.**
	(May) Availability and use of non-work, discretionary time.	
	(May) Relationship between technology, productivity gains and work-life balance	
SOCIAL WELFARE	**Implications for social mobility and labour market polarisation (in job quality, wages, social security coverage etc.)**	ToShare will look how **social protection could favour the free mobility of people** rather than due to necessity. In addition, the project will **propose a regulatory baseline that allows the improvement in the quality of work, wages and adequate coverage of Social Protection**, and therefore an fair distribution of wealth. ToShare is based on the premise that a **universal basic income should not replace but reinforce an adequate system of social protection**. This will allow greater freedom and the development of people, in addition to **help end situations of poverty.** ToShare will also consider how **distribution of wealth and a good social protection system** based on a relationship of freedom between all people, can help to eliminate **situations of discrimination against women.** ToShare will estimate the **economic investment needed in each territory**, with reference to examples, to achieve an adequate **social protection system that includes a basic income**. ToShare will consider as a premise that an **adequate social protection also guarantees the scope of health and social services**, which allow to respond to the needs of each person at each moment, **generating individualised and personalised care.**
	Benefits or challenges of a universal basic income.	
	Gender related	
	Social investment and social protection policies	
	(May) Occupational health and safety issues	
SKILLS AND EDUCATION	**Work and the new skills in demand**	ToShare will document the competences identified by the new work methods, as well as the **type of knowledge required to continue advancing with new technologies.** ToShare will identify the **necessary changes in the educational system that allow the development of learning based on the strengths of each person** which guarantees a positive experience that allows its continued realization during their whole life (**lifelong learning**). ToShare will consider the technological breakthroughs, and the reduced need for employment time which opens up the opportunity to **develop the skills for each person to take**

	Ways of measuring new skills and provide verifiable data of trusted quality	**into account full individual potential** that human beings have not yet developed, allowing greater knowledge of each person and of their surrounding environment. ToShare will look at **favoured scenarios where the well-being and the will of the people must drive the technological changes**, instead of scenarios where it is technological changes that condition social coexistence. ToShare will look at **measures and strategies that could be taken to adapt changes to the pace of people rather than to be conditioned** by the exponential change of new technologies ToShare will identify the **most appropriate models of coexistence in each community and their relation to the content of education and curricula**. ToShare will consider at how **education could be accompanied by the right social support conditions** that allow adequate social protection for each person and empower people to make choices. ToShare will integrate a **gender sensitive approach** to all possible scenarios and good practices on life-long education and training systems, in order to contribute to a change of values that allows for a **major empowerment of girls and women** in society.
	Transformation of education and training systems	
SOCIALLY INCLUSIVE GROWTH	**Associated legal, social and economic challenges and prospects from the Platform economy**	ToShare will identify the **potential of the new economic platforms and link it with forms of participation that respond to a social economy model and to the aims of a solidarity economy** ToShare will also look at the **corresponding legislative changes** needed.
	Assess tax and benefits policies for a fairer distribution of gains.	

1.3 Concept and methodology

(a) Concept

The overall concept underpinning the project **starts from the 20 European social pillars that where approved** at the European Social Summit held in Gothenburg **on 17th November 2017**[5]. The project thus focuses on the applied research needed to identify the elements and measures to develop **a European strategy that embodies these rights as social pillars for a convergence in the respect and enjoyment of these rights**. This requires a political will and its manifestation in different Directives that generate a confluent basis in fiscal, labour and social domains in Europe.

In terms of the central ideas, models and assumptions, the **starting point of the ToShare project is based on the objectives and social rights inscribed in the primary Law of the EU.** That is, the Treaty on European Union, the Treaty on the Functioning of the European Union (TFEU), the Charter of Fundamental Rights and the jurisprudence of the Court of Justice of the European Union, as well as on those other International Agreements signed by member states, giving particularly weight to the International Covenant on Economic, Social and Cultural Rights[6].

Yet in this context, **understanding the role, impacts that new technologies arising as part of the 4th industrial revolution is a key factor.** New technologies are one of the main drivers transforming society, and potentially one of the largest risks but also opportunities for these social pillars. These new technologies, like e.g. artificial intelligence, have and will have a huge impact on our societies.

[5] Namely the social and solidarity economy, redistribution of wealth, work-employment and lifelong education.
[6] EAPN (2016) EAPN Assessment of the 2016 Country-Specific Recommendations

Digitalisation, robots and artificial intelligence, will replace jobs and could increase inequality[7]. On the one hand examples like the automation of industrial and every day processes (i.e. self-driving cars), a reduction in the number of required jobs in some fields like the cinema[8] or others[9]. On the other hand, digitalisation will have a great capacity to provide solutions to many of humanity's material problems and generate wealth[10]. **Analysing these impacts and exploring how generated opportunities can be enhanced, through the development of structures and procedures** (i.e. economic, fiscal, labour, educational, social) is one of the main assumptions on which the ToShare project is built on. The **development of these social investment policies may guarantee equitable wealth distributions** among different population sectors, including men and women in their diversity, and European territories, as well **high welfare levels**, including universal access to health, education, social services and housing services (i.e. human well-being).

In this regard, researching first, how the **4th industrial revolution is impacting on employment** and second, how to **experiment with labour measures and interventions** to address these challenges and opportunities is another fundamental idea of the project. The European Commission itself[11] has undertaken an international comparison of the reallocation labour potential for the various sectors, including a risk analysis comparison between countries of the potential of automation. Yet the evidence is mixed: the reduction of working time may increase the active population. Yet not much actual research with data has been done in this area. There have been some experiments on increasing of productivity or family interaction (community time), however these have not yet been analysed in relation to Industry 4.0[12]. For example, taxes from revenues could decrease with declining employment (in the manufacturing and engineering sectors) therefore a possible intervention measure could be to tax the use of robotics and subsidize the newly unemployed[13].

The ToShare project will analyse these aspects, giving answers to questions like "Is this labour policy viable?", "In which conditions?", "How?", together with identifying the consequences that these kind of labour measures may have on other factors, such as social cohesion, productivity, work-personal balance and work and health & safety conditions.

A main assumption of this project is that the **economy should be at the service of satisfying human needs, as well as taking into account planetary boundaries**. The social and solidarity economy expressly includes these ideas in its charter of principles. For the European case (the Eurozone) – a discussion on the impact of technological progress on employment, inequality and productivity took place in the Netherlands covering the entire European Union countries, with contributions from several researchers of the area. The main issue identified was how technological progress could led to a destruction of middle-level jobs, and thus rise in income inequality.

The ToShare project will be built over a fundamental assumption, the importance **to guarantee access to an inclusive education that allows the continuous development of each person as the basis for European culture.** Here diversity, the values proclaimed in the Universal Declaration of Human Rights provide a cornerstone for education. In this regard, the **equality between men and women and between people from diverse origin, creed and condition, is an objective** that will be present as a transversal theme throughout the whole project.

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[7] A concept paper on digitisation, employability and inclusiveness - The role of Europe, 2017). DG Communications Networks, Content &Technology (CONNECT).

[8] Hollywood case: An insight on the challenges of technological progress in the Film industry and some of the consequences for the workforce, it points out the solution of higher education to face the challenges and to make sure that the progresses advantages overweight the disadvantages (see *https://www.nytimes.com/2015/05/10/magazine/what-hollywood-can-teach-us-about-the-future-of-work.html?_r=0*

[9] Panzaru, C. Brandas, C. (2016) "Towards a Smart Labour Market in the Industry 4.0", in Larsen et al. (Eds.). (2016). Digital (R)evolution and Its Effects on Labour: Opportunities and Challenges for Regional and Local Labour Market Monitoring. Munchen. Rainer Hampp Verlag. 283-295; Weber, E. (2016). Industry 4.0: Job-producer or employment-destroyer? (No. 2/2016). Aktuelle Berichte No. 2; World Economic Forum. (2016). The future of jobs: Employment, skills and workforce strategy for the fourth industrial revolution. World Economic Forum, Geneva, Switzerland.

[10] Andrulis, A. (2017) Income inequality: policy response from the EU perspective; Presentation 5th October.;
EC (2015) Employment, Social Affairs & Inclusion High and rising inequalities; what can be done about it (at EU level)?

[11] http://ec.europa.eu/epsc/publications/strategic-notes/future-work_en#h-1

[12] See for example http://www.tandfonline.com/doi/abs/10.1080/13668800500049704 and
http://www.independent.co.uk/news/business/the-six-hour-work-day-increases-productivity-so-will-britain-and-america-adopt-one-sweden-a7066961.html

[13] https://www.politico.eu/article/key-policy-areas-in-industry-4-0-factories-of-the-future-special-report/

The nature of the challenges addressed by this project **necessitates of a transdisciplinary approach, with the joint intervention of specialists from different and complementary scientific fields**. Moreover, it requires the **participation of people (i.e. experts and citizens) coming from different European regions and territories, giving weight and value to our cultural, social and economic diversity**. Finally, the project will involve a diversity of citizens and networks of citizens with different needs, approaches and demands. This is because in ToShare it is considered that there is a **crucial need to incorporate this rich and diverse knowledge into the design of socio-economic models and strategies (i.e. knowledge co-development)**

Therefore, the ToShare Consortium is composed of **an interconnected rich web of organizations, involving universities, research institutes and municipal and regional governments from different Member States, as well as European and Global networks**. All these **actors are already active and leading initiatives on central issues** such as gender equality, employment conditions, solidarity economy, basic income, democratic models in education and the role of municipalities in education which will **give a robust evidence base to the project.**

In terms of positioning of the project, **this project proposal has an eminently practical nature, since it seeks to develop a European wide strategy and intervention measures to be implemented by policymakers and other relevant stakeholders.** It is backed by practical experiences that prove the validity of these measures. It will **integrate a rich diversity of viewpoints**, the vision of citizens and communities across Europe.

There are many important national and international research and innovation activities **that will be linked** to the ToShare project. The research activities outlined below developed across Europe are directly related to the topics addressed by the ToShare project. This will be incorporated into the development of the different stages of the project through the sequential approach to the ToShare project implementation.

First **regarding labour market related research, the outputs from the activities developed by the European Trade Union Institute (ETUI**) in relation **to research on wages or working time reduction[14].**

Second, **regarding the basic income dimension**, several partners of the Consortium have developed relevant research activities, like for instance**, those developed by the Basic Income Earth Network[15] (BIEN).** Special attention will be paid to experimental research carried out by this Network, in very different geographical contexts[16]. Additionally, different ongoing research results may be analysed from other Member States, like for example **the cases of Finland** ("*Implementing a basic income experiment in a complex welfare state system: a case of Finland*")[17] **Serbia** ("*A path toward UBI Experiment in Serbia*")[18], and **the Netherlands** ("*Experimenting with Minimum Income Guarantee in the Netherlands: Utrecht*" (Utrecht University School of Economics, 2018).

Third, in **relation to the social and solidarity economy, other research studies** to be analysed will be the ones carried out **by EMES, the Research Network for Social Enterprise (of which some consortium partners are very active members), in relation to social entrepreneurship[19],** along with the **research work developed by the Solidarity Economy Europe Network (RIPESS EU)** regarding, among other topics, solidarity economy and public policies. I.e. *Solidarity economy and public policies* (REAS Euskadi, 2017).

Fourth, **research activities related to inclusive education will also be analysed highlighting specially** the database of the **EDCTITIES Network (International Association of Educating Cities), with more than 1.000 experiences that illustrate the principals of the Charter or Educating Cities**, along with the research studies developed by the **EUDEC Network (European democratic education community) in relation to democratic education[20].**

When talking about inclusive education, an inescapable reference in the international field is the **World Conference of Jomtien, held in 1990, on education for all,** or the European project INCLUD-ED: Strategies for Inclusion and Social Cohesion in Europe from Education (2006 -2011), which is the largest on compulsory education funded under priority 7, Citizens and Governance in the Knowledge-based Society, of the Sixth Framework Program of the European Commission, which analyzed the educational strategies that are carried out

[14] https://www.etui.org.
[15] http://basicincome.org/.
[16] http://basicincome.org/.
[17] Social Insurance Finland, 2018
[18] Center for Social Policy; Faculty of Economics, Finance and Administration, Belgrade, 2018
[19] https://emes.net/research-projects/
[20] https://www.eudec.org/Research+workspace

within the schools that lead to social exclusion, in order to contribute actions that contribute to educational success and social cohesion.

Finally, the **Future Work/Technology 2050 Global Scenarios developed by the Millennium Project Foresight Network[21] will be used as referential scenarios for the development of the ToShare European Future Scenarios** (see Box 1). Scenario 1: it's complicated—a mixed bag to be summarized. / scenario 2: political/economic turmoil—future despair to be summarized. / scenario 3: if humans were free—the self-actualization economy to be summarized. Additionally, the **2025 visions and challenges defined by the Millennia 2025 Women and Innovation Foundation** may be considered too guaranteeing the gender equality vision[22].

Box 1: Future Work/Technology 2050 Global Scenarios

According to these scenarios, "*the world is aware that the concentration of wealth is increasing, income gaps are widening, jobless economic growth seems the new norm, return on investment in capital and technology is usually better than labour, future technologies can replace much of human physical and mental labour, and long-term structural unemployment is a "business as usual" surprise-free forecast*". However, at the same time, "*the world is not aware of long-range strategies to address these issues, other than focusing education on science, technology, engineering, and mathematics. Improving STEM education is good, but insufficient to address global unemployment due to artificial intelligence, robotics, 3D/4D printing, synthetic biology, drones, nanotechnology, cloud analytics, and future synergies among these*".

"2050 SCENARIO 1: IT'S COMPLICATED—A MIXED BAG

Employment growth in synthetic biology and other new industries are booming today, while self-employment has become an aspirational norm for many, accounting for 2 billion people. Some basic income guarantee plans around the world have helped to reduce the social chaos expected from those who faced long-term structural unemployment and those taking a long time to make self-employment work for them. New technologies over the last several decades created as much or more new kinds of employment than they replaced. Unfortunately, about a billion people have not made the transition as successfully as others.

2050 SCENARIO 2: POLITICAL/ECONOMIC TURMOIL—FUTURE DESPAIR

There were no long-term strategies in place to reduce the devastating impacts of the dramatic growth in unemployment around the world, especially in high- and middle-income countries. The concentration of wealth continued during the first half of the 21st century as did the widening income gaps and employment-less economic growth. The return on investment in capital and technology continued to be far more than on labour, and the number of persons per services and products has dramatically fallen.

2050 SCENARIO 3: IF HUMANS WERE FREE—THE SELF-ACTUALIZATION ECONOMY

The transition to the Self-Actualization Economy has begun. For the first time in history, humanity is engaged in a great conversation about what kind of civilization it wants and what we, as individuals and as a species, want to become. The historic shift from human labour and knowledge to machine labour and knowledge is clear: humanity is being freed from the necessity of having a job to earn a living and a job to achieve self-respect. Humanity began to break free from the anxiety and pressure to make a living thanks to the basic income guarantee experiments showing that the majority of people used the money more wisely than critics expected. Studies showed that health increased, crime decreased, education improved, and self-employment increased contrary to the view that guaranteed income would make everyone lazy.

[21] http://www.millennium-project.org/projects/workshops-on-future-of-worktechnology-2050-scenarios/

[22] http://www.millennia2015.org/page.asp?id=2303&langue=EN

(b) Methodology

ToShare project will follow a **collaborative methodology**, combining **both exploratory and research stages and experimentation-based approaches, through the development of a Strategy, a toolbox and the implementation of experimental initiatives.**

The project's methodology is built within the Europe 2020 Strategy framework; a strategy that emphasises a **smart, sustainable and inclusive growth** as a way to overcome the structural weaknesses in Europe's economy. Thus, the project will depart from the study of how the technological transformation inherent to the Fourth Industrial Revolution can influence each growth type.

Sustainable Growth

According to **Europe 2020, sustainable growth concept** is founded on the assumption of promoting a more resource efficient, greener and more competitive economy. **The effects of industrialization on the planet are a recurrent topic in the specialised literature**: already in 1820, Henri de Saint-Simon[23] warned against the effects of industrialisation on natural resources. And in 1857, Eugéne Huzar[24] predicted a future full of carbonic acid and carbon oxide disturbing the harmony of the world.

In 2000, Paul Crutzen coined the term *Anthropocene*[25] to the period since 1784, when the steam engine was invented, to nowadays, in which mankind has become the main factor of environmental impact with its industrial activity and characterised by an upsurge in energy mobilization.

As Ulrich Beck pointed in his posthumous work[26], we are facing a social metamorphosis of the world brought by the emergence of global changes, including climate change. According to Beck, "the *old certainties of modern society are falling away and something quite new is emerging*". This "something new" comes from the effects of technological development and scientific advances, and world needs a new paradigm based on a global-level analysis, to address the transformative processes towards a new sociological approach.

Some of the main consequences of the industrial activity on the planet have been the emissions of greenhouse gases, the generalized degradation of the biosphere (acidification of the oceans, extinction rate of species, the modification of the biogeochemical cycles of water, nitrogen and phosphate, the terrestrial ecosystems that have been turned into the artificial ones of pasture, crop-land and cities among others (see figure 1.2.).

According to Crutzen, one of the main challenges to get a sustainable growth in the future will be "*to develop a world-wide accepted strategy leading to sustainability of ecosystems against human induced stresses requiring intensive research efforts and wise application of the knowledge acquired in the information society*".

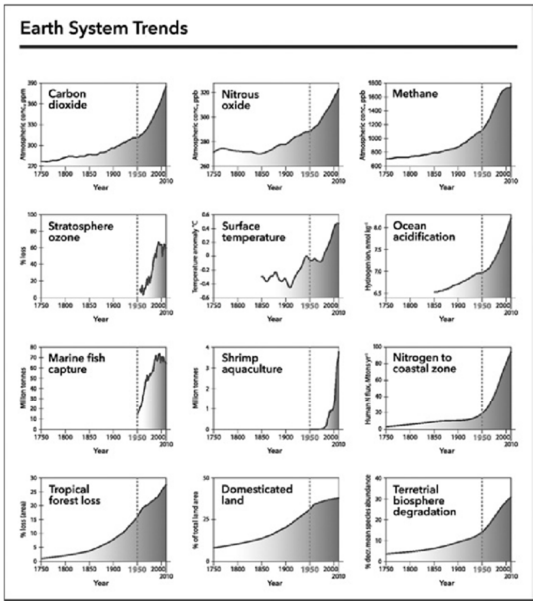

Figure 1.2. Earth system trends. Source: Bonneuil and Fressoz (2016)[27]

[23] Saint-Simon H, Musso P (comments) et al (2012). "Henri Saint-Simon. Oeuvres complètes: 4 volumes". Presses Universitaires de France – PUF. ISBN-13: 978-2130566229

[24] Huzar E (1857). "L'Arbre de la science". E. Dentu. Paris.

[25] Crutzen P.J. (2006) The "Anthropocene". In: Ehlers E., Krafft T. (eds) Earth System Science in the Anthropocene. Springer, Berlin, Heidelberg.

[26] Beck U (2016). "The Methamorphosis of the World: How climate change is transforming our concept of the world". Polity Press.

[27] Bonneuil C, Fressoz J-B (2016). "The shock of the Anthropocene". Ed. Verso. ISBN-13: 978-1-78478-082-1 (UK EBK)

Inclusive Growth

According to **Europe 2020 inclusive growth concept** is founded on the **assumption of fostering a high-employment economy delivering social and territorial cohesion**. In 1930 Keynes predicted that, a century later, the world would be richer and technology would allow us to work just 15 hours per week.[28] In that time global GDP has multiplied six-fold, but wealth distribution does not allow to work less hours. Since 2010, global inequality grows inexorably and the great debate now is not how to improve the social welfare in a technological future but how to **distribute the wealth** to ensure a minimum standard of living for the whole population.

On the other hand, a **hyper-connected digital** society is an opportunity for cultural cohesion and understanding but it is also a breeding ground for extreme ideas and ideologies that provoke a social fragmentation. Other issues such as **migration, geo-economics, international security, national resilience, social inequalities, social identity, justice and ethics** are also affected by technological transformations and need to be studied. Also, technological transformations have the potential to propel societies forward and help governments address legitimate policy concerns, transforming, the policy landscape and **social norms.**

Smart Growth

According to **Europe 2020 smart growth concept** is founded on the assumption of developing **an economy based on knowledge and innovation**. The next industrial revolution will be characterised by a multi-layer industry (specialised, outsourced, delocalised, re-shored, automated…), where hierarchies could disappear and resources and innovation are connected by uncertainty. Yet more research is **needed because, if we look at how the production chains are structured and power relations develop, we can even argue that new hierarchies appear**. ToShare can help to identify these trends. In this transformation there are three main key factors: progress of smart technological solutions, the capacity of society to create new knowledge and transfer it, and the impact of technological changes on **employment.**

One of the dominant debates about the economic effects of technological transformation is whether robots can replace human workers in the years to come[29][30][31][32][33]. **However, this debate is not new in the history of mankind**: luddites, chartists, trade unionists and others reflect that society has lived with fear past industrial revolutions as well.

Even though robotization can accelerate wealth creation, increases in productivity growth do not entail an increase in labour, which can create social tensions. Also, robotization has other impacts on the employment such as the return of the production to the country of origin. Firstly, a distinction has to be made between product and service innovations and process innovations as well[34]. Robots like service robots may have an important role as a producer of new products and as a re-worker of the work process. Secondly, there is a clear distinction from technological determinism, and to emphasize the role of actors, power relations and policies in implementation and development of new technologies (business, employers and employees, ecosystems, etc.). It is a double-impact: in the country of origin and in the country of destination. However, in contrast to what it might appear, the countries with higher density of robots for 10,000 industrial workers (South Korea, Singapore and Germany) are the countries with lowest unemployment rates. This is because increases in productivity growth and wealth allow to invest in other activities such as services and leisure if a political majority is found for that.

Technologies linked to the New Industrial Revolution will need **new profiles and skills**. The jobs more likely to be automatized are low and medium-skilled (e.g. accountant). However, in future even high-skilled jobs may be at stake due to further advancement of AI. This will lead to imbalances between demand and supply, which will be a

[28] Keynes, J.M (1963) "Economic Possibilities for Our Grandchildren" Essays in Persuasion, New York: W.W.Norton & Co. (http://www.econ.yale.edu/smith/econ116a/keynes1.pdf)

[29] Ford M (2016). "The rise of the robots: technology and the threat of a jobless future". Basic Books. ISBN-13: 978-0465097531.

[30] Brynjolfsoon E, McAfee A (2016). "The second machine age: work, progress and prosperity in a time of brilliant technologies". W.W. Norton & Company. ISBN-13: 978-0393350647.

[31] Markoff J (2016). "Machines of loving grace: the quest for common ground between humans and robots". Ed. Ecco. ISBN-13: 978-0062266699.

[32] Susskind R, Susskind D (2017). "The future of the professions: how technology will transform the work of human experts". Oxford University Pres. ISBN-13: 978-0198799078.

[33] Avent R (2016). "The wealth of humans: work, power and status in the 21st century" St. Martin's Press. ISBN-13: 978-1250075802.

[34] Feldmann, H. (2013) Technological Unemployment in Industrial Countries. Journal of Evolutionary Economics23 (5),1099-1126.

big social and **educational** challenge. On the other hand, jobs that require creativity, critical thinking or social intelligence are at the moment very difficult to be carried out by robots. Added value and not hours will be the next *bargaining chip* and values such as the sense of belonging and personal branding will mark the relationships between employees and employers, which is a big opportunity to innovate in the education system and labour market. Also the way we think about the role of education might be fundamentally changed, the ever decreasing half-life of knowledge caused by fast evolving technologies.

The current moment offers a strategic opportunity to proactively enhance gender equality and prevent widening gender and skills gaps. It is therefore critically important to understand the barriers hindering parity across distinct sectors and job families, and to look for strategies that allow to effectively overcome these hurdles.

Also, the Fourth Industrial Revolution is transforming entire systems of **production, distribution, and consumption** providing both opportunities for value-creation through game-changing technologies, as well as challenges on ensuring inclusivity.[35] Finally, light should be shed on the question of how citizens want to deal with a society, where work due to increasing automation has become scarce.

In this context, the first exploratory stage of the project will start with the implementation of **"WP2: Identification of socioeconomic effects of technological transformations"**. This WP will identify the main socioeconomic factors involved in the technological transformations towards a sustainable, inclusive and smart growth, through both quantitative and qualitative methods (i.e. surveys, interviews, desk research….).

- Sustainable growth: Identification of factors, such as the ones mentioned in previous paragraphs and others (GHG emissions, degradation….), along with qualitative and quantitative information to analyse the past technological transformations and to infer lessons to learn for the future. Also, this task will analyse future trends to identify challenges and opportunities.
- Inclusive growth: Identification of the main socioeconomic factors involved in the technological transformations towards an inclusive growth, such as poverty and social exclusion, social welfare systems and wealth distribution, distribution of productive and reproductive work between men and women, as well as qualitative and quantitative information to analyse the past technological transformations and to infer lessons to learn for the future. Also, this task will analyse future trends to identify challenges and opportunities.
- Smart growth: Identification of the main socioeconomic factors involved in the technological transformations towards a smart growth, such as R&D, new profiles and skills, education system and employment, and consumption, as well as qualitative and quantitative information to analyse the past technological transformations and to infer lessons to learn for the future. Also, this task will analyse future trends to identify challenges and opportunities.

After the identification of main socioeconomic effects of technological transformations on previously mentioned dimensions, **WP3 "Best practices analysis"** will identify main key factors to be taken into account to deal with the opportunities, challenges and gaps arising from technological transformations identified in WP2. In particular, pertinent policies applied in Europe in order to address existing gaps in the four dimensions analyzed will be identified, and the factors behind success and failures of these cases will be classified. The research activity will provide data in order to define the further research steps. The methodology employed will be desk research focused on policies implemented in Europe and semi structured qualitative interviews with organizations involved in the implementation of these cases. Finally, relevant cases will be analyzed. The main methodology employed will consist in selecting relevant cases and creating an analysis framework to apply a check-list in order to identify the key factors for every case study and to measure the overall performances. A useful scoring system to classify and compare policies will be consequently defined.

In **WP4 "Development of alternative future scenarios"**, the different future contexts will be analysed according to the four dimensions and the results of WP2 and WP3. As a first step, Michel Godet's strategic foresight toolbox will be used to define the system, identify and determine the main variables (impacts and key factors) of the scenario space and analyse the actors' strategies. Following this task, projections will be made by determining the continuation or cessation of the trends (morphological analysis). Throughout the WP, the involvement of key stakeholders, communities and citizens will be ensured through futures workshops (to be held in each of the partner countries) and the different communication platforms (website, social media…). The alternative scenarios will

[35] Source: World Economic Forum: www.weforum.org.

therefore be co-created, describing the possible future situations and the course of events that drive it. Finally the most probable and desirable scenario will be selected through the Delphi Method.

After the reflection about the possible future scenarios concerning the effects of the fourth industrial revolution, in **WP 5 "Definition of the Strategy: policy interventions and measures for each of the analysed dimensions"** the strategy for socially cohesive growth and economic competitiveness will be determined. This WP will propose policies and interventions aimed at enabling the transition to a social solidarity economy, redistributing wealth, transforming education and training systems and improving the employment and labour markets. Throughout the strategy definition, the co-creation approach based on social innovation methods with relevant stakeholders and communities will contribute to the subsequent successful implementation of the policies. The draft strategy will be put into practice in WP6 and the effectiveness of the policies, strategies, practices and other interventions aimed at promoting equitable, inclusive and sustainable growth, will be then assessed. The strategy will then be re-designed to adapt it to the stakeholders' requirements and to the assessment of the toolkit. The final deliverable will therefore be the Strategy that will enable a new economic and social model consistent with the fourth industrial revolution

Some of the piloting of the initiatives that arise in WP5 will be carried out through **WP6 "Design and evaluation of basic income experiments: a tool kit"**. This phase will start early in the project by deeply analysing other practices in history and around the world related to the basic income. During the completion of WP5, the spotlight will be set on creating a basic income toolkit that will allow testing policies in real regions and/ or cities. The toolkit will contain resources to put into practice a range of experiments or policies. A global network and hub will be put into place and the key practitioners, research bodies and delivery groups will identified as well throughout the WP.

Finally, **WP7 "Co-creation approach, engagement, dissemination, communication and exploitation"** has a twofold purpose. On the one hand, it will coordinate and facilitate the ToShare co-creation approach in all WPs to engage stakeholders, communities and citizens. The social innovation methods to be used will be designed in this WP as well as the framework and the engagement techniques. On the other hand, WP7 will define as well as the Communication, Dissemination and Exploitation strategy of the ToShare project. The target audiences will be identified, the ToShare brand will be created, and the tools and methods to be used for internal and external communication will be developed within this WP too. Finally audio-visual material will be created too in order to adequately disseminate the projects findings and outputs.

Consideration and inclusion of gender critical issues across project research activities – European policy papers and research reports identify gender equality as a prerequisite for inclusive, sustainable and smart growth. In this regard, the project aims to provide a better understanding of the identified challenges raising new questions, providing new perspectives, and creating a more complete picture of the issues through consideration of women's and men's differentiated realities and needs, and the integration of gender specific data and knowledge to fill research gaps (gender sensitive research). ToShare understands that integrating a gender perspective into research can improve its relevance, coverage, and quality. It c influence policymakers and contribute to gender-responsive policies in Europe that address both men's and women's needs and interests and enhance gender equality in all dimensions of life. This calls for a gender mainstreaming approach in research at different levels:

- Transversal: all topics/dimensions of research
- Systematic: in each step of the research process (research questions, approach and methodology, data collection, contrast, analysis and dissemination/communication)
- Transformative: project research processes and its findings and proposals should contribute to overcome inequalities and transform gender power relations.

Among others, project partners will commit to the following gender-responsive research standards:

- Acknowledge our own bias as researchers avoiding prejudices and double standards
- Identify human/social components of the any research topic and anticipate impacts of policies/ practices on men/women
- Build a gender balanced research team with adequate capacity for gender analysis
- Define a conceptual framework integrating feminist theories and reflecting men's and women's experiences
- Develop a gender sensitive methodology
- Choose a gender balanced sample
- Give value to both men's and women's experiences and voices
- Use and produce gender disaggregated data

- Conduct a gender sensitive analysis
- Use gender sensitive language in the research products and communication tools

1.3 Ambition

The participation in the same consortium **of entities of different but complementary nature, which are already leaders in their field with either previous research or practical engagement in the frontline of these topics guarantees that the ToShare project goes beyond the state of the art.** Both in the territorial scope, as well as in the research topics and present knowledge areas, the project will represent a step forward. Indeed, the **confluence of entities that represent hitherto, separated areas such as technologies, labour market, social and solidarity economy, basic income and inclusive education, is a unique added value**, not seen in other exploratory or experimental projects.

In addition, the **participation of regional governments, along with the participation of different kind of stakeholders' networks allows the development of a collaborative methodology, with a stronger impact, due to the multiplier effect of the interactions created throughout the whole project, among different kinds of stakeholders** (i.e. citizens, policy makers, organized civil society…). This way, the **integration of very diverse and multidisciplinary point of views and visions is guaranteed (from different geographical, cultural, social and economic backgrounds and scopes),** overcoming the challenges that more traditional research projects may have in this regard, which is the current state-of-the-art.

Besides, a **gender perspective** will be integrated in all project processes and products ensuring men and women's needs and demands are considered. Indeed, project partners' experience and capacity in this regard will guarantee this. Specifically, Oreka Sarea will provide support to enhance and monitor gender mainstreaming in project internal organisation and management and research content, approaches and products.

In Short: To Share is an ambitious project which involves the participation of a diverse set of partners, from different regions, knowledge fields, perspectives and territorial scope, with the same vision and objective: to help develop a European strategy which incorporate effective intervention measures that will lead us to a more cohesive and fair society, through fiscal, labour and social regulations, to fight against the current inequality and situations of poverty and social deprivation, as well as job precariousness, in the context of the 4th industrial revolution.

The project has the **vision and ambition to lead Europe to become a reference for other countries when it comes to using new technologies at the service of society and people, where the values of equality, freedom, justice, peace and democracy are present.**

Meanwhile the project is **grounded on the necessary reality and urgent need seen to propose viable transformational intervention measures in relation to our four-key different pillars, in an interrelated way. The scope of the project in European in approach**, not focusing only on the Consortium members countries but rather using the first hand in depth experience of these countries to help build a bigger richer picture for a European wide strategy that incorporates differences as assets.

In terms of the ToShare **innovation potential** this lies on the following 4 main aspects:

1. First, the innovation will be developed mainly through **interactive and engaged processes of communication and contrast with the diverse stakeholders and citizens** of the different European regions.
2. Second, based on existing known data, **future scenarios that have not previously been addressed will be developed and their potential impact evaluated.** For example, the influence that the reduction of working hours may have on different realities such as productivity, balance of work and personal life, working conditions and health & safety at work. In this regard, the project will also deepen the relationship of complementarity that a universal basic income can have with the salary derived from a reduction of working time.
3. Third, based on a strong **exploratory work**, the project will look for a **practical approach** to be implemented by policymakers, companies and other stakeholders in real life contexts, being the creation of the toolkit and the network a good example for this.
4. Fourth, synergies will be explored to stimulate **a public policy that favours the creation of a social and solidarity economy companies**.

2. IMPACT

2.1 Expected impacts

ToShare has identified four clear impacts it will focus on. The table below summarises how ToShare impacts equate to the impacts in the call

Table 2.1.: How ToShare Impacts cover all Call Impacts

ToShare IMPACTS	CALL IMPACTS
To study how new technologies at the service of the needs of people and the community, can bring economic competitiveness, wealth and benefits that are equally distributed among all people, men and women in their diversity, and populations.	- Multifaceted social and economic impacts of the technological transformations - Contribute to promoting social inclusion - Promote economic development and wellbeing - Fairness and equitable distribution - Social Benefits from technological advances - European strategy for socially inclusive growth
To analyse and demonstrate evidence how the Social and economic benefits derived from the distribution of wealth, in turn will allow an adequate social protection system with a universal basic income, with the potential effect of allowing a distribution of employment and unpaid work through a reduction in working hours.	- Contribute to promoting social inclusion - Promote economic development and wellbeing - Fairness and equitable distribution - European strategy for socially inclusive growth
To analyse the regulatory framework (i.e. European legislation) in the social, labour and fiscal areas that allows an adequate distribution of wealth and employment, guaranteeing a good social protection system and employment for all ensuring gender equality.	- Contribute to promoting social inclusion - Promote economic development and wellbeing - Fairness and equitable distribution - European strategy for socially inclusive growth
To look at how to design and implement an education system based on learning methodologies that overcome gender stereotypes and enhance the strengths of each person and equal opportunities for both girls and boys, women and men, allowing their continuous and complete development.	- Contribute to promoting social inclusion - Promote economic development and wellbeing - Higher skills and productivity - European strategy for socially inclusive growth

IMPACT 1: To study how new technologies at the service of the needs of people and the community, can bring wealth and benefits that are equally distributed among all people and populations, giving particular attention to the social and solidarity economy, sustainable growth and smart growth.

In terms of impacts in relation to societal needs, ToShare aims to generate

Firstly, a **social needs and demands guidelines to help direct research and applications and social implications of new technologies**. To do so we will identify the regulations and other instruments that make it possible to achieve it (**toolkit**, etc). The main drawback could be the lack of will and interest of the large corporations that lead the new technologies and the weaknesses of the respective political institutions.

Secondly, to visualize and **identify the wealth that new technologies bring**, where ToShare will undertake a number of investigations, publications, events and forums that echo this. We also identify here as a barrier the lack of interest and willingness of the corporations that develop and benefit from new technologies. In this context we

will give particular attention to the role of the social and solidarity economy as response. Also to the EU initiatives on Smart Growth and Sustainable Growth.

Thirdly, we will generate impact by applying these new technologies themselves, to help achieve a fair distribution of benefits among all the population and people in different countries. In terms of quantification we will aim to **develop proxy indicators from our investigations, as well as from other publications, events and forums** that echo this. A series of databases on collected information and evidence will be generated summarising the main results. Main results will be shared as policy briefs with examples from cases around Europe, and with public events presenting and contrasting the main results. These results will all be used as valuable input into the final report on the proposed strategy.

IMPACT 2: To analyse and demonstrate evidence how the social and economic benefits derived from the distribution of wealth, in turn will allow an adequate social protection system with a universal basic income, with the potential effect of allowing a distribution of employment through a reduction in working hours. We will look at the concept of Inclusive growth.

In relation to Impacts and specific targets as it relates to re-distribution of wealth, ToShare has several impacts related to understanding options to redistribute wealth:

Firstly, it aims to undertake research that helps to ensure that the priority of the economy is to satisfy the social needs of the populations. This will be achieved mainly through **targeted research, and a series of publications of different types**. Particular attention will be given to the hosting of thematic events and forums that address this particular topic. Extra efforts will be made to include several social groups and citizens in Europe who are already engaged and active in this topic. **We will undertake M&E and learning on all of our activiti**es. In terms of barriers we have identified on the one hand a potential lack of legislation that make it compulsory, and on the other the interests of large corporations and their encouragement to achieve ever greater and faster economic benefits. As legacy ToShare will leave a Global Knowledge Sharing Network on these topics.

Secondly, we aim to quantify the **social investment needed to finance a social protection system, including a universal basic income**. We will through our Investigations, publications, events and forums develop a series of indicators and data that document these social investment policies and their outputs. In terms of barriers we identify that these measures might be contrary to the interests of insurers and other financial entities. Thus ToShare will have looked at the concept of Inclusive growth. ToShare will also generate a valuable database on wealth generated from new technologies, as well as suggestion on key indicators, and potential transition pathways (based on Scenarios).

Thirdly, we look to have an impact on the **objective of a job for all people**. For example, we will look and quantify this based on a shorter working day, with the economic complement derived from a universal basic income. Although ToShare is aware that the **effects of Basic Income to the object of providing "jobs for all**" in the future depend on an enormous number of factors difficult to estimate in a reliable manner, ToShare aims to **generate some good quality reliable data**. There are numerous research, publications, events and forums that study the implications, although in terms of barriers it might be difficult to collect concrete evidence. In particular, ToShare will generate an Income Typology Report on practices identified and described on how basic income can help to social protection and to combat poverty, a Basic Income Toolkit that has been tested in practice and best practices identified and described on how on how new technology can help reduce/prioritise social investment. Other concrete outputs will be a database including the costs of social protection which include basic income.

Fourthly, identify and show **concrete examples on the advantages to progress on equality between women and men, as well as for personal and community well-being**, derived from a shorter working day than the current one. We will generate indicators based on evidence generated by our own research and other research, which in turn we will turn into publications. Thematic events and forums that study this topic will also be held. The main barrier and obstacle we identify is the macho and patriarchal culture which is the origin on the need to change current patterns.

IMPACT 3: To analyse the regulatory framework (i.e. European legislation) in the social, labour and fiscal areas that allows an adequate distribution of wealth and employment, guaranteeing a good social

protection system and employment for all.

ToShare aims to make an impact in the **main regulatory framework particularly at EU level**. Although an ambitious goal we think the timing is crucial. Thus to have an impact we have identified:

Firstly, on legislation, by looking for ways to harmonize legislation on **fiscal, labour and social matters**. We will thus monitor our impact on progress through our own research on **identified regulatory barriers, but also by potential enabling legislation**. The main obstacle will be the great variety of situations and different legislations currently existing in Europe. In terms of concrete impact ToShare will generate a manual on good fiscal practices, a reference library on studies and communication to the different interest groups in Europe. Descriptor sheets will be generated on the different progressive tax systems in Europe characterised using the same standardised parameters.

Secondly, to help achieve **labour, social and economic cohesion in the different territories** and populations of Europe by documenting the **demands from different interest groups and citizens of Europe**. The main barrier will be the opposing interests of those who benefit from the current legislative framework. Importantly new valuable data will be generated thanks to the planned surveys and interviews with relevant stakeholders on consequences of different models, approaches and policies, like for example the pros and cons for the local communities to include non-productive/reproductive work based on our case studies.

Thirdly we will give emphasis and **importance to overcoming the salary and social gap between men and women** throughout Europe. We will thus document available Research, publications, in this area. The main obstacle to change here is the dominant macho and patriarchal culture.

IMPACT 4: To look at how to design and implement an education system based on learning methodologies based on the strengths of each person, allowing their continuous and complete development.

In relation to Impact 4 which is focused on education and skills ToShare has identified 4 clear objectives in terms of achieving impact. Two of these impacts are more general (best knowledge and best practices), whereas two characterise the underpinning hypothesis and stance from ToShare: lifelong learning and person-centred education, gender balance and education and training as enmeshed in the wider social context (what we have called the social value chain).

First, based on a comprehensive review ToShare impact through the characterisation of **main effects of technological transformations on inclusive and permanent education**, the identification based on expert knowledge (including end users) on **new skills needed** to labour market change from Industry 4.0s, and consequently, on education and training schemes. New competencies and ways of measuring new skills demand, to also provide verifiable data of trusted quality. The **main barriers** to the inclusion of new skills will be **described and mapped**.

Second, impact through the **mapping of current and emerging best practice** in relation to innovative training systems associated to the evolution of the labour market. In addition, whenever **possible factors** that promote an inclusive, democratic and permanent education system. The **main opportunities e.g. in terms of regulation or other types of incentives** to scale up these best practices and re-enforce these key factors will also be outlined.

Third, impact in the hypothesis of ToShare to be documented and quantified through real examples on **future key skills** where jobs that require creativity, critical thinking or social intelligence are very difficult to be carried out by robots. The hypothesis to be demonstrated is that **added value and not hours will be the best strategy**. As recently stated at the Covenant of Mayors (Feb 2018) **an approach of "People first", i.e. a sense of belonging and personal branding** defining the relationships between employees and employers. For impact $ this will be looked at from the perspective of fitness of purpose of **opportunity to innovate in the education system and labour market**. Impact based on a deeper knowledge and quantified indicators and evidence on how better personal knowledge (physical and mental), based on the strengths of each person will be the best strategy for Industry 4.0. Thus this stance will be included in the ToShare scenarios.

Fourth, the fourth impact as permeating the whole ToShare approach is to give attention and focus to the presence and **performance and greater equality between men and women**, as well as to **the community approach**, i.e. the person, student and worker as part of the community where both re-enforce each other- be accompanied by the

right social support conditions that allow adequate. Issues related to workforce considerations as it relates to gender will be given special attention. **Also the potential for cooperation and re-enforcement between the social value chain (schools, social enterprises, community groups) as hubs of social innovation.**

Box 2. TO SHARE OVERALL IMPACT:

Importantly, as well as the specific four impacts identified, since these impacts are intimately connected and re-enforce one another as responses to deep technological changes, ToShare will have a set of transversal results and outputs that will feed into the final Strategy.

In particular it will generate a database on relevant practices implemented in Europe to bridge the existing gaps in relation to each of the four dimensions of study, identify the key factors to bridge the existing gaps in relation to each of the four dimensions of study, generate a series of Scenarios covering all the 4 pillars of the study with the identification of the main projected variables (impacts and key factors).

Overall all the work undertaken in ToShare will be have the overall strategic aim of the project in mind as outlined in the Excellence session: **to define a strategy that contributes to the development of an inclusive and sustainable socio-economic model, adaptive to the changes of the fourth industrial revolution**. **Thus the final destination and Vision of ToShare is to define this Strategy.** Thus The Final report will outline this Strategy from the research results undertaken by all partners that identify potential measures to enable a new economic and social model consistent with the fourth industrial revolution in Europe. This will incorporate the outcomes from ToShare results, like for example the final Basic Income Evaluation results, data and information gathered on the main Socioeconomic effects of the technological transformation, the potential alternative futures scenarios, including the desirable scenario. Also the valuable new results from the stakeholders contrasting process, including the main conclusions.

This Strategy report will be presented and contrasted (in draft format) at a Final conference to showcase the results of the project. We will benefit from these inputs to enrich the discussion and reflections around future strategies in the context of the 4th Industrial revolution and policy recommendations. Importantly, and a main innovative aspect and added value of the project is that the whole process of generating results thanks to the networks involved and stakeholders as partners or advisors, or supporters will be based on a co-creation methodologic frame and plan and network map

ToShare Strategy: strategy that contributes to the development of an inclusive and sustainable socio-economic mode

2.1.1 Impact in relation to innovation capacity, market opportunities, competitiveness, environment and other social elements

IMPACT 1: To study how new technologies at the service of the needs of people and the community, can bring wealth and benefits that are equally distributed among all people and populations, giving particular attention to the social and solidarity economy, sustainable growth and smart growth.

- *How to Enhance innovation capacity:* The innovation and key challenge lies in advancing the universal access to the benefits derived from these new technologies.
- *How to create new market opportunities*: Understand how these new generated markets that can help to meet the needs of both material and immaterial needs of all humanity (human wellbeing).
- *How to strengthen the competitiveness and growth of companies:* To consider the democratic aspects in the access to new technologies as well as their regulation to guarantee the creation and strengthening of companies
- *How does this impact relate to climate change and the environment:* To look at how new technologies from a social and a solidarity economy could guarantee equality between all people, and between women and men, thus overcoming the current equity and gender gap.
- *How does this impact consider other important societal elements:* To include aspects related to resource limits and planetary boundaries into the social and solidarity economy, for the development of new technologies

IMPACT 2: To analyse and demonstrate evidence how the social and economic benefits derived from the distribution of wealth, in turn will allow an adequate social protection system with a universal basic income, with the potential effect of allowing a distribution of employment through a reduction in working hours. We will look at the concept of Inclusive growth.

Below we also state how Impact 2 will consider a number of key aspects:

- *How to Enhance innovation capacity:* This will enhance the innovation capacity by having better and grounded information and data on how to transition from the current reality, which contemplates serious imbalances and differences in the different communities present in Europe, to achieve a coherent social protection system compatible with the cultural diversities of the different peoples.
- *How to create new market opportunities:* The distribution of wealth will stimulate the demand for new services, especially those related to the care and well-being of people.
- *How to strengthen the competitiveness and growth of companies:* The demand for new services could boost the creation of new companies and new jobs.
- *How does this impact relate to climate change and the environment:* A distribution of wealth should allow a much more efficient global use of natural resources, thus contributing to a better use of natural resources, with a lower environmental footprint.
- *How does this impact consider other important societal elements:* It will allow to overcome the situations of poverty and the care, diversity and growth of different cultures as an asset to increase social resilience.

IMPACT 3: To analyse the regulatory framework (i.e. European legislation) in the social, labour and fiscal areas that allows an adequate distribution of wealth and employment, guaranteeing a good social protection system and employment for all.

- *How to Enhance innovation capacity:* it relates to regulatory innovation, through the design and/or modifications and implementation of European directives in fiscal and socio-labour matters that have a transition period, which allow gradual changes in the current legislations in force in each European state.

- *How to create new market opportunities:* The strengthening of Social and economic cohesion throughout the European territory will favour a steady internal market throughout Europe which allows the right conditions for innovation and pursuit of new business models (e.g. social innovation, circular economy, low carbon economy, digital, etc).
- *How to strengthen the competitiveness and growth of companies*: A clear and level playing field in socio-labour and fiscal legislation throughout Europe will allows the strengthening and growth of current and new companies (e.g. social and solidarity economy, green economy, digital, etc).
- *How does this impact relate to climate change and the environment:* a strong and clear European regulatory framework will guarantee sound natural resource management, with the right penalties and incentives for the correct use of natural resources for long term sustained growth.
- *How does this impact consider other important societal elements:* It guarantees effective equality between men and women and among people residing in the different territories across Europe.

IMPACT 4: To look at how to design and implement an education system based on learning methodologies based on the strengths of each person, allowing their continuous and complete development.

Below we also state how Impact 4 will consider several key aspects:

- *How does the Education and Skills Impact enhance innovation capacity*: The innovation consists IN designing methods that from the peculiarities and strong points of each person allow to advance their global development.
- *How does the Education and Skills Impact help create new market opportunities:* The continuous and universal education of all the people allows the growth in competences. This in turn favours the creation of a better skilled workforce and thus realisation of new business models and new markets.
- *How does the Education and Skills Impact strengthen the competitiveness and growth of companies:* A continuous and global education allows an increase in European competitiveness and the creation of new companies and adaptation of current companies and their workforce to exponential changes, being able to capture new opportunities, rather being threatened by these changes.
- *How will the Education and Skills Impact relate to climate change and the environment:* The continuous and global education of the person will allow a greater environmental awareness and thus incentivise a less consumerist ways of life, focused on quality of life and human well-being, which incorporates a greater respect of nature and the environment.
- *How will the Education and Skills Impact consider other important societal elements:* It allows the cultivation of new hobbies and skills that will enrich the Cultural Heritage of Humanity and strengthen Europe´s strength on cultural heritage and wealth.

2.2 Measures to maximise impact

The ToShare Project has made sure to establish tools and strategies that guarantee the visibility of the project and its results, both during the development of the project and beyond it lifetime. Given the importance of this point, ToShare wanted to have partners specialized in this area, such as the Young Foundation and Weroi, with a long history and experience in transferring messages, conclusions, and value propositions of all kinds of projects to society in general and to the target audience in particular. The synergies and experience of both partners will allow for the optimum communication, dissemination, and exploitation of the progress and results and impacts of the ToShare Project.

The Project has also set as a critical task the involvement of all partners in the dissemination and exploitation process, since this is a key requirement to get desired impact on identified stakeholders and society in general.

(a) Dissemination and exploitation[36] of results

The ToShare Project has a specific WP that describes in detail the tasks to be carried out in terms of communication, dissemination, and exploitation. This information is available on the WP7, led by Young Foundation, with the collaboration of Weroi.

One of the first tasks to be carried out is a robust mapping of the project's main target actors: Key people in the dialogue among the 4 central pillars of the project: Specialised Policy Makers (at local, regional, national and European level); Citizens; Socio-economic agents from the social and solidarity economy field (public and private institutions; ONGs); Academic institutions; Research institutions; VET organizations; Networks, the media, generalist media, other past and present European H2020 projects, and society in general.

Given the overall character of the Project (both geographically and in terms of the disciplines it covers), collaboration and co-creation have become an important differential and added value of the ToShare project, with a clear network approach in which the variety of partners ensures a rapid dissemination of the results generated.

ToShare is therefore designed to achieve interdisciplinary and cross-border impact. All partners undertake to maximise the potential impact of the Project's results in terms of their dissemination to relevant stakeholders, including the above-mentioned target audiences, and others such as: European public and private organisations that relate to the topic of the Project.

In addition, in order to facilitate communication, dissemination and exploitation of the project's results, it is proposed to use technological tools such as the Project's blog and intranet, with the following objectives:

- Blog: As part of the bidirectional communication strategy, a blog strategy is proposed in which visitors can interact with the content published in the Project. In this blog, visitors will be able to evaluate the content shared by those parties responsible for the project, will be able to comment on that same content, and even create discussions among users and project managers, in order to generate public debate.
- Intranet: The intranet will be an internal communication space, accessible only with the express authorisation of those parties responsible for the Project. The purpose of this intranet is to have a digital support accessible from anywhere in the world, which compiles the documentation for internal use of the Project, such as possible events to attend, communication templates, public and private deliverables, notices and alerts to members, etc.

These two tools will be complemented with all those mentioned in the WP7, such as: Web, Newsletter, Social networks, events, Conferences, etc.

It is proposed to use two types of reports. An internal monthly report, which helps to measure the impact of the actions carried out on a monthly basis, and a summary report, which is to be submitted along with the project's follow-up reports. Set dates for submission of Project monitoring reports.

Draft 'plan for the dissemination and exploitation of the project's results

There is a complete work package detailing the communication and dissemination strategy on one hand, and the exploitation on the other, to avoid overlaps between them and to ensure the proper functioning of both separately and jointly.

The way to reach identified target audience is as detailed in the Project's WP7. To summarize, main communication channels and secondary communication channels have been established, which will be measured monthly in order to be aware of the impact the progress of the Project has generated.

The objective is to work on each one of the pillars analysed in the Project with both an isolated and joint approach: Social and solidarity economy, redistribution of wealth, decent work and employment, inclusive education, and gender equality. The aim is to bring together consistent results in all these areas to create a socio-economic framework (i.e. legal, fiscal, …), that improves the well-being of all European citizens. Indeed, to produce a real impact and transformation within current established standards.

In addition to attending events created by organizations outside the project, ToShare has defined other types of meetings that will be created to involve the target audience of the project: co-design workshops, policy-master classes, seminars/webinars, etc. This way, we will organise a broad range of events during the term of the project.

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[36] See participant portal FAQ on how to address **dissemination and exploitation** in Horizon 2020

We will engage new audiences at local and regional level by translating and disseminating the outputs and learning, through innovative events/session (co-design workshops, policy-master classes, seminars/webinars, etc), capacity-building and learning materials (modules, manuals), policy-guides (including policy recommendations and tools) and online dissemination.

Towards the end of the project, an Exploitation plan will be produced through which we will widely share and transfer ToShare knowledge portfolio and case studies. This document will first include the overview of project results. It will briefly describe the nature of the ToShare policies and tools, case studies and other methodological innovations achieved through the project, with ample reference to the project website for further information - will demonstrate the transferability of these results in all 4 dimensions. The plan will outline the strategy to continue disseminating these results to specific target groups and stakeholders after the end of the project and will list and explain the foreseen dissemination and communication activities to be implemented after the project has ended, as well as a calendar to do so. This plan will also identify the constraints and assumptions which could be confronted in the roll-out of the Exploitation Plan and will budget the costs of this plan, indicating potential sources of funding between project beneficiaries, other EC funds, and other co-financing sources.

It is important to highlight as well that the plan will establish the guidelines to make sure that the Global Knowledge Sharing Network resulting from WP6 will continue working once the project is finished, through the definitions of the necessary steps and elements to make sure that the new network will be dynamic thanks to the active involvement of key stakeholders.

As for the main communication channels, the following ones are defined:

Main communication channels:

- **The ToShare Project website:** A web page will be designed and developed to help centralize all the communication actions of the project in a single online platform.
- **ToShare in Social networks**: Social networks will serve as communication channels through which to reach our target audience. The selection of these channels will be based on the defined communication objectives. Some of the social networks to use will be the following:

Table 2.2.: Social media channels

NAME	LOGO	TARGET AUDIENCE
LINKEDIN	LinkedIn	Research communities, European Policy makers (local, regional, national and European level)
TWITTER	twitter	General media and specialised media
FACEBOOK	facebook	Civic society and Citizens

- **The ToShare Brand and corporate visual identity:** One of the main actions that have been proposed is the design of a strong brand, so that the target audience begins to associate the communication strategy with the To Share Project as of the very beginning. The brand will be designed based on the H2020 recommendations and guidelines, and will be accompanied by a brand manual. This manual will help all partners use the brand correctly in all applications that are designed: Leaflet, standard presentation, roll-up, Poster (1 version and 1 update), and press kit for media.
- **ToShare Project leaflet, PPT presentation:** A project description leaflet in Spanish, English, French, and German and if possible in all partner country languages, will be designed and printed. A standard project PPT presentation will be created, using the key messages. This presentation will be updated after each progress meeting.
- **ToShare Articles at local level:** Presenting the most relevant events of the project (project launching, monitoring results, etc.)

Secondary communication channels:

- Final EU-level workshop: The final period of the project, with all the results clear and once the existing potential for solidarity economy, redistribution of wealth, decent work and employment, inclusive education and gender equality has been demonstrated, a great effort will be made in the creation of workshops and a final

conference in which key actors, such as European Commission policy makers and Civic society, Citizens, etc. will be informed of the project's findings. The aim will be not only to inform, but to get their active involvement and to encourage them to take the ownership of resulting outputs.

- Conference and Events attendance: it should be highlighted how, many of Consortium partners are used to attend annual international meetings, as for instance:
    - The BIEN Annual Congress, the Regional Science European Regional Science Association (ERSA), the Regional Studies Association (RSA) Annual Conference, the Annual Congress of the International Institute of Public Finance, the European Network on Regional Labour Market Monitoring (ENRLMM) Annual Meeting and European Day, among many others.

  This way, partners will be actively involved informing and discussing about the project's contents and results in events and conferences from all around the world, fact that will produce a multiplier effect on the desired results and impacts. Additionally, some of the most interesting events/conferences might include:

Table 2.3: Events planned by partners for attendance (2018-2019) to highlight existing networks and activities

TITLE	DATE
EUDEC Conference (Heraklion, Greece)	August 2018
IDEC Conference (Bengaluru, India)	November 2018
ENERGIZING FUTURES – Sustainable Development and Energy in Transition (Tampere, Finland)	June 2018
ENRLMM Conference: Changing Need for Qualifications, Soft Skills and Competencies (Exeter, UK)	September 2018
European Week of Regions and Cities (EWRC)	October 2018
Global Social Economy Forum 2018 (Bilbao, Spain)	October 2018
International Political Science Association World Congress. City TBC	2022
4th Labour Law Research Network (Valparaíso, Chile)	June 2019
18th BIEN Congress. Basic Income and the New Universalism: Rethinking the Welfare State in the 21st Century (Tampere, Finland)	August 2018
The 14th ESA Conference 2019: "Europe and Beyond: Boundaries, Barriers and Belonging" (Manchester, UK)	August 2019
"Bilateral investment treaties and impact on social rights and environmental protection areas" (San Sebastian, Spain)	May 2019
International Workshop on Public Policy	June 2018
Work, Labour and Redistribution	October 2020

On the other hand, the following table shows a small sample of the events attended in the past by some of the project partners. It presents the high dissemination capacity of the Consortium partners as a whole.

Table 2.4: Range of Events attended by partners (2016-2017) to highlight existing networks and activities

TITLE	DATE
17th BIEN Congress. Lisbon, Portugal.	September 2017
Basic Income Network Simposium 2016	November 2016
"The Great Regional Awakening: New Directions" RSA Annual Conference 2017, Dublin, Ireland	June 2017
International Conference on Public Policy. Singapore	June 2017
Xabier Itçaina "Social economy, local development, and Catholic ethics in Southern Europe: between moralizing capitalism and solidarity alternatives", paper for the Panel *Religion, economy, and welfare: universal values, plural interpretations, and local politics*, ECPR General conference, University of Oslo.	September 2017
«Gizarte ekonomia eta lurralde mobilizazioak Ipar Euskal Herrian » [social economy and territorial mobilization in the French Basque Country], colloque *Kooperatibismoa eta eraldaketa soziala – Cooperativismo y transformación social*, IV. Kooperatibagintza Topaketak, Lanki-Mondragon Unibertsitatea.	June 2016
UK SPA Annual Conference 2017, Durham. (Paper presented: Basic income,	July 2017

parenting leave and gender equality)	
"Workfare, Labour Markets, and Distributive Justice. The case of Basic Income" (B. Laín)	September 2018
21st World Congress of the International Society for Labour & Social Security Law (Cape Town)	September 2015
Money without working (Universal Basic Income) at Evangelische Akademie (Protestant Church Akademy)	September 2017
ISPIM Innovation Conference, Vienna	June 2017
13th Conference of the European Sociological Association: "(Un)Making Europe: Capitalism, Solidarities, Subjectivities", Athens, Greece.	August 2017

Some of the main KPIs to be measured in the project

Table 2.5: Main ToShare KPIs

TOOL	ANALYTICS	RESULTS
WEB	Web access locations, most viewed pages, total users, average time on each page, and sources of access, among others	Inquiries received through contact forms and Project file downloads
BLOG	Most shared content, most read content	Participants in debates and comments.
NEWSLETTER	Openings and clicks in the e-mail	Responses to e-mails sent
INTRANET	Members that access the web the most and the most popular information reviewed.	Most active partners on the intranet.
SOCIAL NETWORKS	New followers and most shared content generating high engagement levels.	Responses to content published.
EVENTS	-	Total number of participants and requests for collaboration with the Project.
CONFERENCES	-	Total number of participants and requests for collaboration with the Project.

All the above mentioned in this section, as well as in the WP7, will be dealt with in detail in one of the first deliverables planned for month 4, which will refer to the *D 7.1: Communication, Dissemination and Exploitation Plan*, updated annually (from Month 4)

Strategy for knowledge management and protection

A data management plan will be prepared and regularly updated, with special emphasis on the protection of the personal data of partners and persons interacting with the Project. This plan will seek to be as restrictive as possible, to ensure as much open access as possible.

Therefore, the project has already identified that the data and information to be generated and collected will be as follows:

- Information to be generated: Results, conclusions and findings resulting from the research carried out.
- Information to be collected: Information from previous studies and data on the people who decide to interact with the Project online and offline.

The personal data of the people who interact with the Project (by means of the blog, for example), will be stored in accordance with the law, with the option to rectify or delete it, if users so request.

In addition to the Data Management Plan, there will be a Consortium Agreement to regulate and ensure free access to Project information and conclusions (DPI, research data, etc.).

In terms of data exchange and data protection, the Project contemplates the use of an intranet for private access by the partners of the Project, and a complete website open to anyone interested in the Project, which will be updated with quality information and under a perspective of free on-line access, such as the 'green' or' gold' model.

(b) Communication activities[37,38]

All communication activities are described in WP7. We will define and implement the key tools to be developed for the proper functioning of communication. In addition to the blog and intranet that have already been mentioned above, communication activities will be carried out in:

- Web: to centralize all communication actions of the project in a single online platform. This website will be continuously updated with the progress of the Project (conclusions, new findings, etc.).

- Newsletter: Automatic periodic communication piece sent by e-mail to those people who have shown interest in being informed about one or more of the dimensions dealt with in the Project.

- Social networks: If we view the web as the platform that will host all the communication resources of the Project, social networks will serve as communication channels through which to reach our target audience.

- Events: Online and offline events will be the meeting point face-to-face with the different target audiences of the Project.

- Final Conference: A final meeting will be held to which different target audiences will be invited, in order to make known the conclusions of the Project.

We will create audiovisual material for the communication and dissemination, and exploitation plan that will ensure the value proposition and conclusions of the Project are clearly communicated, making clear reference to the available options (video, infographics, white paper, etc.), in order to have a forecast of the necessary material to be developed throughout the Project.

This material will also be used to ensure the collaboration of:

- Key people in the dialogue involving the 4 central pillars of the project: Solidarity economy, education, redistribution of wealth, and work and employment. People with high media impact at the local, national and international level.
- Specialized media: Active collaboration with those media that actively support and promote one or more of the Project's dimensions.
- Generalist media: Generalist media will collaborate with those generalist media, both national and international, which, despite not having as their main theme any of the topics dealt with in the Project, share an editorial line similar to the approach and objectives of the research.
- Other past and present H2020 European projects: Collaboration with H2020 projects partially or fully related to the subject matter of this research.
- Society in general, recognising its diversity. As the final beneficiary of the implementation of the conclusions obtained in the project.

3. IMPLEMENTATION

3.1 Work plan — Work packages, deliverables

The work plan consists of 7 work packages (WP) that follow a logical sequence of activities and feed each other. There are management, preparation, implementation, piloting and dissemination and exploitation WPs, including a wide set of indicators to evaluate the progress and impact as indicated in Section 1 Excellence and Section 2 Impact. Activities are structured along these distinct phases and across the four knowledge areas: social and solidarity economy, re-distribution of wealth, work- employment and education- skills.

The WP structure is composed in a way to minimise the risks related to the achievement of the project objectives and to assure the successful project completion. Moreover, the distribution of work and responsibilities among universities, research centres, networks, policy makers and communication performers should provide an optimal application of expertise of all partners.

The project starts with an analysis of the main socioeconomic effects arriving from the technological transformations (WP2). Almost at the same time, WP3 will look into the opportunities, challenges and gaps arising from the technological transformations identified in WP2 by analysing global practices and understanding the key

[37] See participant portal FAQ on how to address **communication activities** in Horizon 2020

[38] For further guidance on communicating EU research and innovation for project participants, please refer to the H2020 Online Manual on the Participant Portal.

factors that make them a success or a failure. WP2 and WP3 will interact in terms of being the common knowledge ground for the project follow-up and WP3 will use WP2's findings along the way.

Upon the finalisation of WP2, the possible future scenarios (WP4) will start to be designed aiming to an inclusive socioeconomic model that guarantees equality, equity, justice and sustainability. WP2 and WP3 therefore provide an introductory and preparatory work for the scenarios and policies to be developed in WP4 and WP5 respectively. The work developed in the previous WPs will therefore directly interface with the policy interventions and measures to be designed in WP5.

The toolkit of WP6 on the other hand will be the test bed of the rest of the work packages and will, in turn, also provide feedback to WP5, after the assessment of the implementation. The results of the testing will in fact be used to define optimum approaches to effective policy interventions.

The stakeholders engagement that will be ensured in WP7 will be present throughout the project phases but specially on WP4 (Scenarios) and WP5 (Policy interventions) when stakeholders will be consulted through social innovation methods. WP5 will therefore have an iterative nature even before the piloting phase due to the constant interaction with external stakeholders, communities and citizenship. Besides the methodological approach shortly described, adequate methods for an effective project management (WP1) and a high multiplying and dissemination effect (WP7) will be adopted.

Figure 3.1: ToShare WP interdependencies

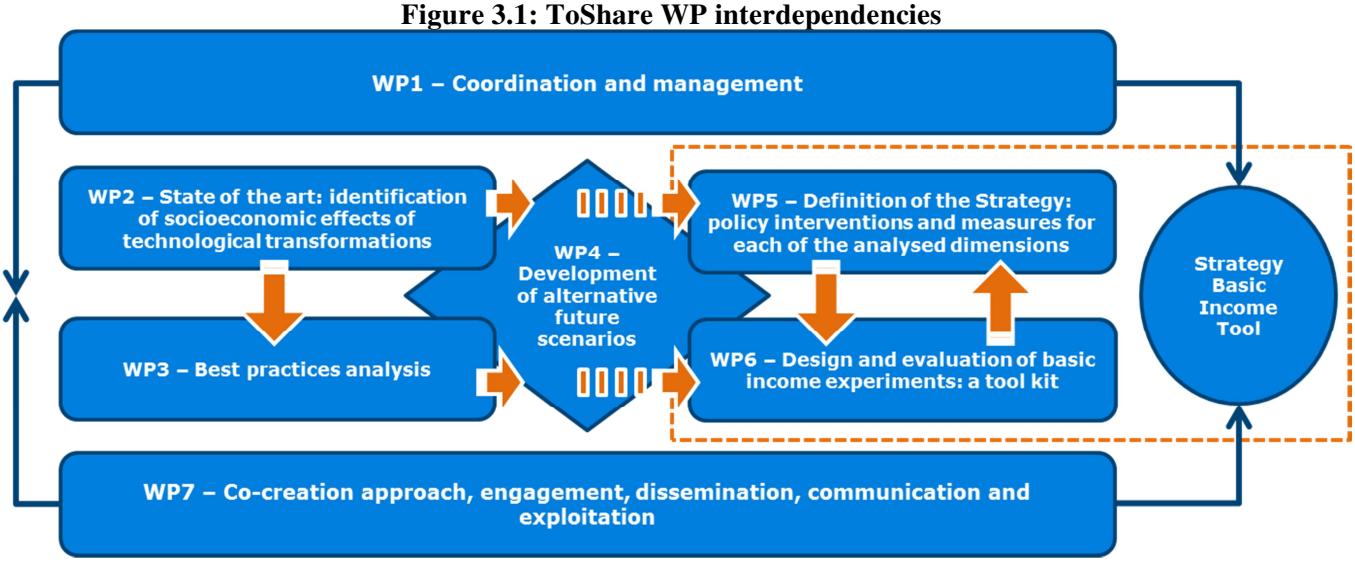


Figure 3.2: Workpackage breakdown

Figure 3.3: Gantt Chart

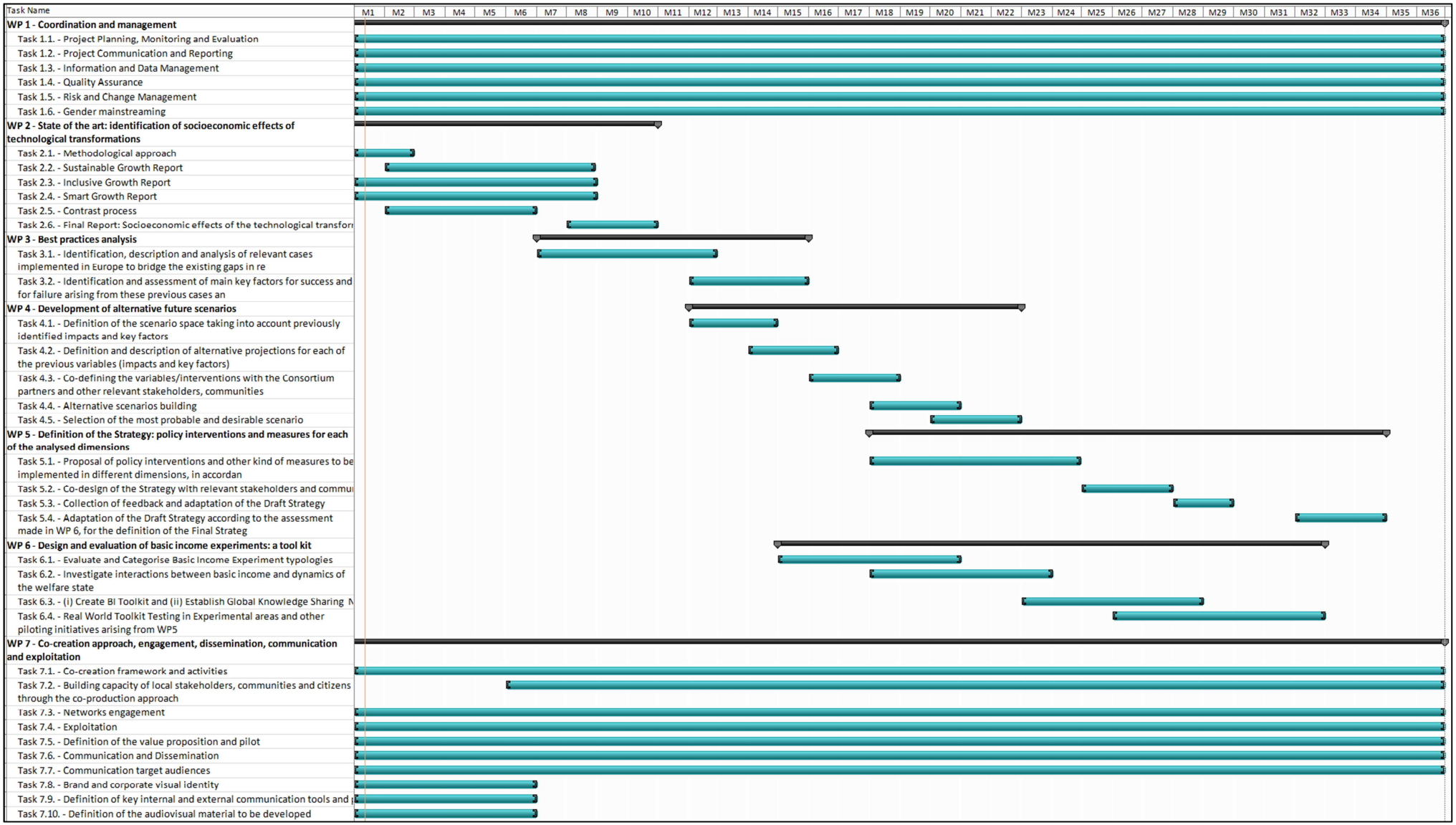


Table 3.1a: List of work packages

WP No	Work Package Title	Lead Participant No	Lead Participant Short Name	Person-Months	Start Month	End month
1	Coordination and management	1	UPV/EHU	73	1	36
2	State of the art: identification of socioeconomic effects of technological transformations	2	TECNALIA	50,5	1	12
3	Best practices analysis	14	USI	51	7	15
4	Development of alternative future scenarios	10	PKT	48	12	22
5	Definition of the Strategy: policy interventions and measures for each of the analysed dimensions	1	UPV/EHU	66	18	34
6	Design and evaluation of basic income experiments: a tool kit	16	RSA	46	15	32
7	Co-creation approach, engagement, dissemination, communication and exploitation	12	YF	73,5	1	36
				Total person-months	**406,5**	

Table 3.1b: Work package description

Work package number	1			**Lead beneficiary**					UPV/EHU		
Work package title	Coordination and Management										
Participant number	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**
Short name of participant	UPV/EHU	TECNALIA	IBEI	UVT	EURICSE	IEPBX	BIPA	UPF	RIPESSEU	PKT	UEDIN
Person months per participant:	34	2	1,5	1,5	1,5	1,5	1,5	1,5	1,5	2	1,5
Participant number	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**	**21**	
Short name of participant	YF	WEROI	USI	GN	RSA	UB	CNRS	UYORK	DOCRI	OREKA	
Person months per participant:	2	1,5	1,5	1,5	2	1,5	1,5	1,5	1,5	8,5	
Start month	1			**End month**					36		

Objectives

The main objective is to ensure the effective and timely achievement of project objectives, deliverables and milestones in the most cost-efficient manner. Specific objectives are:

- To guarantee a smooth flow of information and efficient decision-making processes within the consortium;
- To ensure the timely execution of the activities according to the original plan;
- To guarantee the integration of a gender perspective at all levels and stages of project implementation;
- To monitor progress of the planned activity and anticipate as much as possible potential shortfalls according to the Plan, Check, Do, Act (PDCA) cycle principles;
- To coordinate the financial management of the project by controlling expenditures;
- To report to and communicate with the European Commission;
- To organise regular Project Management Board meetings and ensure timely interactions with the Advisory Group.

The main responsibility of this work package will be with the Project Coordinator.

Description of work (where appropriate, broken down into tasks), lead partner and role of participants

In order to achieve these objectives, the following tasks will be carried out:

The main responsibility for coordinating the project lies with the Project Coordinator and will be managed in close cooperation with the rest of partners. The Coordinator will be assisted by a Project Manager and by the Project Liaison Office at UPV/EHU and by Oreka Sarea. The Main Tasks foreseen for this WP are as follows:

Task T1.1 Project Planning, Monitoring and Evaluation (M1-36). Task Leader: UPV/EHU Partners Involved: [ALL]

This task will deal with the overall activity planning and consortium coordination in activity execution. Within this task, the coordinator will make sure that activities performed by each consortium member, including involvement of local organizations, are properly executed. The coordination will be made possible through the Project Management Team (PMT) with the support of Oreka Sarea (on issues related to gender mainstreaming), which consists of the Project Coordinator and the WP leaders. The PMT will meet face-to-face once a year during PMT meetings and monthly via online platforms such as Projectplace, reporting the status of each WP, any delays as well as deciding on actions to correct possible issues. During the face-to-face meetings, the PMT will discuss in detail aspects related to planning, monitoring and evaluation and each WP leader will report in detail on the progress of the WP, while virtual meetings will provide a more general update and focus on any factor that will affect risks and/or change management. Appropriate agendas will be developed. The project coordinator and the PMT will also have regular interactions with the Advisory Group. A more thorough involvement of the Advisory Group will be sought on a yearly basis (during PMT meetings), and inputs from the PMT will be discussed in the PMT meetings. Recommendations will be included in the action planning based on majority voting. A consortium agreement will regulate the functioning of the whole consortium and the PMT; the consortium agreement will include a ToR for the PMT.

The specific project coordination tasks accomplished by the Project Coordinator together with the Project Manager will be as follows:

- monitoring project progress and responding to important changes during the lifetime of the project
- controlling manpower resources and running costs
- timely submission of reports, deliverables, cost statements, financial certificates etc. to the EC
- financial and legal administration (e.g. transfer of the payments from the EC to the partners, organisation and maintenance of the consortium agreement
- ensuring the distribution of documents/information among the consortium
- external affairs and representation of the project (incl. PR)

Task T1.2 Project Communication and Reporting (M1-36). Task Leader: UPV/EHU Partners Involved: TECNALIA, USI, PKT, RSA, YF

The project coordinator of the consortium will be directly responsible for communicating and reporting to the EC. As such the coordinator will make sure the PMT will provide proper and timely information related to each Work Package and will consolidate such information into the reports that are to be submitted to the EC. Moreover, the

coordinator will make sure that advice and inputs of the ToShare project officer at the EC will be taken into consideration and that work plans and budgets are adjusted according to the agreed upon inputs from the EC. Information sessions explaining reporting requirements of the EC will be organised, as appropriate, within the consortium to ensure full compliance with the Grant Agreement conditions. This task consists of annual face-to-face progress meetings of the ToShare Consortium and the external Advisory Group, as well as monthly teleconference calls of the PMT. Moreover, the Project Coordinator will liaise at regular intervals with the EU project officer.

Task T1.3 Information and Data Management (M1-M36). Task Leader: UPV/EHU Partners Involved: [ALL]

Each member of the PMT will be responsible for keeping proper administrative information and financial data about the project. Internal administrative data collection and financial reporting mechanisms will be arranged by each Work Package leader according to standards predefined in the PMT. Project Information Management will be centralised at the Project Coordinator's end. This task will include the preparation of a Data Management Plan within the broader task of Project Information Management. The Data Management Plan will follow the template included in the H2020 Online Manual.

Each Work Package leader will keep records of information and data generated during the Project implementation. The PMT will be tasked with the responsibility of labelling each item generated per its nature (e.g. strictly confidential as opposed to public). The PMT will also decide on which information will be publicly available on the website. A specific session within the PMT meetings will be dedicated to Information management (including deliverables and how to properly collect and store such deliverables).

Task T1.4 Quality Assurance (M1-36). Task Leader: UPV/EHU Partners Involved: [ALL]

The main responsibility of Quality Assurance for the Project lies with the Project Coordinator at UPV/EHU. A Project Manager (guided by UPV/EHU's Quality Manager) will support the coordinator on a daily basis in checking that: 1) timing of activities, deliverables and milestones are on schedule; 2) documentation is received by all partners in a timely manner and adheres to quality aims; 3) documentation is according to predefined project standards; 4) reports are compliant with standards committed with the EC; 5) writing meeting minutes and follow-up action points; 6) deliverables are compliant to predefined standards; 7) results are achieved according to pre-defined indicators; 8) all deliverables are produced according to a pre-defined template, ensuring the quality of all deliverables follow the same format; 9) results are contributing (or are on the right track to contribute) to the predefined impact.

Project Standards and indicators will be defined by the PMT taking in consideration the Grant Agreement and will be included in a Quality Management Terms of Reference that will be part of the consortium agreement. Further, in this task, the WP7 activity and impact indicators for the dissemination activities and their level of response and interest will be monitored and evaluated. Quality Assurance activities will be reported in the Annual Report.

Task T1.5 Risk and Change Management (M1-36). Task Leader: UPV/EHU Partners Involved: [ALL]

A risk management plan is set up in the very beginning of the project by UPV/EHU and will be constantly updated. Changes may concern: 1) changes in the consortium (a partner, a staff member, etc); 2 changes in deliverables (nature of the deliverable or indicator); 3) changes in schedule; 4) changes in Project Information and Data Management; 5) changes in Advisory Group; 6) variations in spending. To this end, the plan will cover actions and activities that will enable the consortium to continue its work. A detailed risk management plan is given at the end of the present section. The Project Manager will make sure to monitor risks initially identified, report to PMT on the status of such risks and seek actions from the PMT because of any changed circumstances associated to a specific risk. The Project Manager will make sure that actions identified in such instances will result in a revised risk management document.

The Project Manager will keep track of any changes and unforeseen issues affecting the planning of the project in a change management register. She/he will help in communicating as appropriate to the task leader who will report major issues to the PMT (i.e. issues that may affect activities in more than one Work Packages). The Project Coordinator ensures that this is communicated to the EC, especially about changes that have impacts on the quality of the deliverables.

Task T1.6. Gender mainstreaming (M1-36). Task Leader: OREKA Partners Involved: [All]

The integration of a gender perspective in project implementation and evaluation will be a shared responsibility of all partners. Specifically, Oreka Sarea will provide advisory and technical support to all project partners and

management structures. The specific tasks accomplished by Oreka Sarea together with the Project Coordinator and Project Manager will be as follows:

- developing project tailored guidelines and standards for gender mainstreaming,
- providing technical guidance to all project WP and research processes.
- revising project strategic documents
- advising decision making processes
- facilitating working relations and exchange with feminist and women's rights organizations and other relevant stakeholders promoting gender equality and women's rights

The ultimate aims is to ensure a gender perspective is integrated throughout project structures, strategic documents, guidelines, and research processes, analysis and results.

Deliverables

D 1.1: Risk Management Strategy Document (M1). A document outlining the main risks identified for the project and measures to be taken

D 1.2: Change Management register (M1). A document that summarises how changes and adjustments made e.g. in procedures, etc, will be documented and monitored

D 1.3: Inception Report (M4). Report after the Kick Off Meeting (KOM)

D 1.4: Gender mainstreaming guiding document, updated annually (M4). Document on the gender mainstreaming policy that summarises actions taken

D 1.5: Consortium Agreement (M6)

D 1.6: Project Information Management Strategy (M5). How the Consortium will operate internally (meetings, reports, etc)

D 1.7: Data Management Plan (M6). DMP to be in compliance with H2020 requirements

D 1.8: Annual and Final Report (M12, M24, M36, as appropriate). Report to summarizes progress made on an annual basis compared to the DoA

Work package number	2				**Lead beneficiary**				TECNALIA			
Work package title	State of the art: identification of socioeconomic effects of technological transformations											
Participant number	**1**	**2**	**4**	**5**	**7**	**8**	**9**	**12**	**14**	**18**	**20**	**21**
Short name of participant	UPV/EHU	TECNALIA	UVT	EURICSE	BIPA	UPF	RIPESSEU	YF	USI	CNRS	DOC RI	OREKA
Person months per participant:	8	18	1	5	4	3	1	5	1	1	5	0,5
Start month	1				**End month**				10			

Objectives

The main aim of this WP is to analyse the socioeconomic effects of technological transformations arising from the fourth industrial revolution such as automation, robotisation and digitisation, as well as Artificial Intelligence. Major opportunities and challenges for the different dimensions on which inclusive societies are built such as work/employment, inclusive and permanent education, redistribution of wealth and the current economic model (profit maximization versus solidarity,social economy and environmental sustainability) will be analysed. For example, WEALTHTECH as one example of the application of AI with the replacement of expertise and human experience with artificial intelligence (e.g. robo-advisers). In addition, considering a possible sustained growth of automation-induced productivity growth potentially leading to employment scarcity, opportunities to introduce

new social policies (e.g. universal basic income) shall be discussed here. The scope of this research will be Europe-wide focusing on EU countries. and will comparatively analyse these impacts on different dimensions. The analysis will be based on the three pillars of the Europe 2020 strategy.

Specifically, the following objectives are defined:

1. To identify the effects (opportunities and challenges) of technological transformations on:
   - Development of new areas of economic growth in industries and services
   - Employment and labour markets and unpaid work.
   - The demand of new skills associated to labour market changes, and consequently, on education and training schemes.
   - Social welfare and wealth distribution.
   - Current economy system, versus solidarity and social economy.
2. To specifically assess the rise of digital platforms and the platform economy in European countries in order to examine associated legal, social and economic challenges and prospects.
3. To evaluate and compare not only historical perspectives on how previous industrial revolutions impacted European societies but also an historical analysis to point future trends "to anticipate how fourth technological revolution (new generation of robots and the AI) will affect the economic, social and political power relations in the society.
4. To visualize potential gender gaps and inequalities in each of these four dimensions, ensuring a sophisticated situation analysis that includes the assessment of power dynamics.

Description of work (where appropriate, broken down into tasks), lead partner and role of participants

To this aim, the following tasks will be developed:

Task T2.1 Methodological approach. (M1-2) Task Leader: TECNALIA Partners involved: UPV/EHU

This first task will consist of the definition of the methodological approach to follow in order to identify the socioeconomic effects of technological transformations on the previously mentioned four dimensions. As illustrated by Figure 3, the methodological process will consider a triple perspective, based on the three main pillars of the Europe 2020 strategy, as a way to overcome the structural weaknesses in Europe's economy: smart, sustainable and inclusive growth.

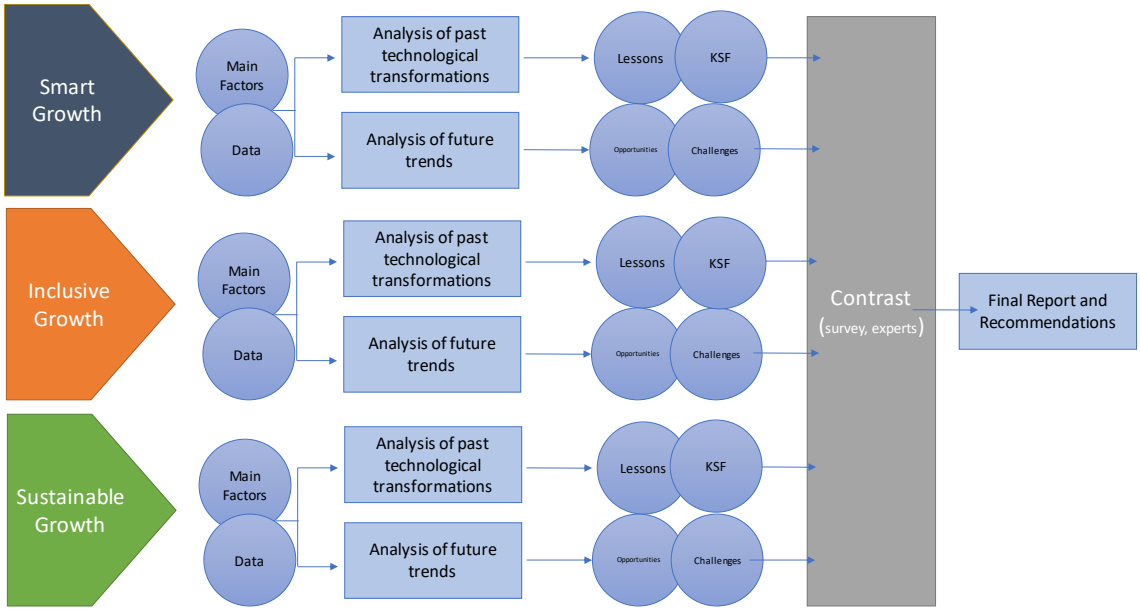


Figure 3.4. Methodological process of WP2.

As seen there, within each pillar we will identify and define the main factors inherent to them. For instance, employment rate, research and development or rate of women in STEM careers for "Smart Growth", poverty, social exclusion, social welfare or wealth distribution for "Inclusive Growth" or greenhouse gas emissions, energy from renewables or energy efficiency for "Sustainable Growth". Taking into account these factors, we

will analyse the socioeconomic effects of the past technological transformations, and lesson learned and key success /failure factors will be drawn. Subsequently we will evaluate the validity of developments of the past for the future. Also, we will study future trends in socioeconomic effects of technological transformation and opportunities and challenges will be identified in each case. As in case in point the role of the platform economy (sharing economy) on wealth and income distribution as well on working conditions will be examined. Recent research suggest that the development of computer technology has given rise to a digital economy where profits increasingly accrue to leaders in their respective business field[39] . Few or close to zero benefits are left to the second-best competitor in the market, The reasons for that are the network effects that are applying for tech companies once they have attracted a crucial number of end-users. Another aspect is the almost zero marginal cost[40] that is inherent in tech services and products, which makes each copy of an existing service or product infinitely cheaper (think of music songs, online newspaper articles, MOOC). Generally, what some researchers fear is that platform companies with their inherent scalability and low cost will strive to establish mono- or oligopolies and eliminate competition to dictate their terms and conditions[41] leading to growing inequality and deteriorated working conditions. Other researchers are convinced that the technology itself and the internet savvy millennials will gradually replace the role of global companies and lead to the establishment of peer-to-peer platforms approaching zero marginal cost thus ring in an era of prosperity for all[42].

Tentatively, the index of each document will cover the following points (giving particular attention to digital platforms and the platform economy):

- Chapter 1. Understanding of the concept and objectives. Critical issues of the study.
- Chapter 2. Methodological approach, data sources and literature review
- Chapter 3. Main socioeconomic factors to study
- Chapter 4. Identification of lessons and key factors from past technological transformations
- Chapter 5. Study of future trends and identification of challenges and opportunities

Inclusive Growth Report, Sustainable Growth Report and Smart Growth Report conclusions will be subjected to a **triple-contrast process**:

a. General surveys with specific questionnaires for each of the following stakeholders: universities, RTOs, private companies, NGOs, networks, public administration/ public agencies. We aim at a minimum of 250 responses choosing a gender and country balanced sample.
b. Interviews to 50 experts, including men and women and gender perspectives, on location and over the telephone
c. Final Workshop with stakeholders and practitioners selected from the previous groups, in line with the planning inWP7.

The final report, "Socioeconomic Effects of technological transformation" will be the result of the contrast process and the main input for the scenarios developed in WP4.

Task T2.2 Sustainable Growth Report. (M2-8) Task Leader: TECNALIA; Partners involved: RIPESS EU, EURICSE, DOC RI

This task will identify the main socioeconomic factors involved in the technological transformations towards a sustainable growth or non-growth era, such as the ones mentioned in previous section "1.3. b) Methodology" and others (i.e. greenhouse gases emissions, impacts on biosphere, overproduction, overconsumption, upcycling…), as well as qualitative and quantitative information to analyse the past technological transformations and to infer lessons to learn for the future. Also, this task will attempt to anticipate future trends to identify challenges and opportunities. It shall be assessed how technological progress may be used in a sustainable way, to prevent any further decline of our ecosystem. Facing the on-going and partly irreversible destruction of our habitat, it shall be critically assessed if a model based on GDP-growth is in the long run still viable for our planet. The methodological approach explained before above will be followed.

Task T2.3 Inclusive Growth Report. (M2-8) Task Leader: UPV/EHU Partners involved: UPF, CNRS, BIPA, DOC RI

[39] Bynjolfsson et al 2014, UNCTAD 2017
[40] Zysman and Kenney 2015
[41] Morozov 2013
[42] Riffkin 2015, Sundaram 2016

This task will identify the main socioeconomic challenges involved in the technological transformations towards inclusive growth, such as poverty and social exclusion, gender inequality, social welfare systems and wealth distribution, as well as qualitative and quantitative information to analyse the past technological transformations and to infer lessons to learn for the future. Also, this task will analyse future trends to identify challenges and opportunities. Especially, the potential of technology to spur inclusive growth shall be discussed here (e.g. Fintech (like M-Pesa) doing away with high banking fees that represent a welfare gain for the less well-off in particular.). The methodological approach explained above will be followed.

Task T2.4 Smart Growth Report. (M1-8) Task Leader: TECNALIA Partners involved: UPV/EHU, BIPA, DOC RI

This task will identify the main socioeconomic factors involved in the technological transformations towards smart growth, such as R&D automated mobility systems, energy efficiency, new profiles and skills, education system and employment, and consumption, as well as qualitative and quantitative information to analyse the past technological transformations and to infer lessons to learn for the future. Also, this task will analyse future trends to identify challenges and opportunities deriving from technologies such as robotization, AI, 3-D-Printing and its implication for poverty, employment and education. The methodological approach explained above will be followed.

Task T2.5 Contrast process. (M4-8) Task Leader: YF Partners involved: UPV/EHU, TECNALIA, UPF, CNRS, BIPA, UVT, RIPESS EU, EURICSE, USI, DOC RI

Inclusive Growth Report, Sustainable Growth Report and Smart Growth Report conclusions will be subjected to a **triple-contrast process**:

a. General surveys with specific questionnaires for each of the following stakeholders who play a key role in understanding the socioeconomic effects of technological transformations: universities, RTOs, private companies, NGOs, networks, public administration/ public agencies. We aim at a minimum of 250 responses choosing a gender balanced sample.
b. Interviews to 50 experts, including men and women and gender perspectives, face to face and over the telephone, in Spain, Romania, Italy, Hungary, Switzerland, UK, Luxemburg, France and Germany.
c. Final Workshop with stakeholders and practitioners selected from the previous groups, in line with the planning inWP7.

All project partners will identify and facilitate relevant stakeholders' contacts for this contrast process. This task will complete and qualify the main conclusions obtained in the previous work packages.

Task T2.6 Final Report: Socioeconomic effects of the technological transformation. (M7-10) Task Leader: TECNALIA Partners involved: DOC RI

Having into account the previous working papers and inputs obtained from the contrast process, a final report will be developed with following indicative index:

- Chapter 1. Understanding of the concept and objectives. Critical issues of the study.
- Chapter 2. Methodological approach, data sources and literature review
- Chapter 3. Main socioeconomic factors to study
- Chapter 4. Identification of lessons and key factors from past technological transformations
- Chapter 5. Study of future trends and identification of challenges and opportunities
- Chapter 6. Policy recommendations

Deliverables (brief description and month of delivery)

D 2.1: Sustainable Growth Report (Month 8). Report with main socioeconomic factors involved in the technological transformations towards a sustainable growth; qualitative and quantitative information to analyse the past technological transformations and to infer lessons to learn for the future; future trends to identify challenges and opportunities.

D 2.2: Inclusive Growth Report (Month 8). Report with main socioeconomic factors involved in the technological transformations towards an inclusive growth; qualitative and quantitative information to analyse the past technological transformations and to infer lessons to learn for the future; future trends to identify challenges and opportunities.

D 2.3: Smart Growth Report (Month 8). Report with main socioeconomic factors involved in the technological transformations towards a smart growth; qualitative and quantitative information to analyse the past technological transformations and to infer lessons to learn for the future; future trends to identify challenges and opportunities

D 2.4: Final Report: Socioeconomic effects of the technological transformation (Month 10). Report compiling previous analysis: critical issues of the study; methodological approach; main socioeconomic factors to study; identification of lessons and key factors from past technological transformations; study of future trends and identification of challenges and opportunities; policy recommendations

Work package number	3					**Lead beneficiary**					USI
Work package title	Best practices analysis										
Participant number	**1**	**4**	**5**	**7**	**8**	**9**	**11**	**14**	**18**	**19**	**20**	**21**
Short name of participant	UPV/EHU	UVT	EURICSE	BIPA	UPF	RIPESSEU	UEDIN	USI	CNRS	UYORK	DOCRI	OREKA
Person months per participant:	4	14	2	2	2	2	1,5	16	2	1	4	0,5
Start month	7							**End month**		15		

Objectives

The main objective of this WP will be the identification of key factors to be taken into account to deal with the opportunities, challenges and gaps arising from technological transformations identified in WP2, through the study and analysis of relevant cases already implemented.

The identification of these key factors is one of the important steps that will guide the proposal of future policy interventions in next WPs, to enhance the opportunities created and to minimize the gaps produced by technological transformations. Specific objectives include:

1. To identify and analyse relevant policies (both success and failure cases) implemented in Europe in order to address existing gaps in the four dimensions analysed. The four dimensions include the effects of the technological transformation on 1) employment and labour markets; 2) changing labour demand for differently skilled workers; 3) wealth distribution and social welfare; 4) transition of the actual economy to a social economy.
2. To identify and assess the factors behind success and failures of these cases. Particular attention will be paid to the link between the gender dimension, employment outcomes and the geographical distribution.

Description of work

Task T3.1 Identification, description and analysis of relevant cases implemented in Europe to bridge the existing gaps in relation to each of the four dimensions of study (M7-12). Task Leader: UVT and Task Co-leader: USI Partners involved: UPV/EHU, UPF, CNRS, BIPA, EURICSE, UYORK, UEDIN, DOC RI

This task will provide data in order to define the further research steps. The methodology employed for this task will be (1) desk research focused on relevant cases implemented in Europe, (2) semi structured qualitative interviews with organizations involved in the implementation of these cases and (3) representative survey data, and official reports[43].

Desk research frame	Suggestions
Desk research sources	Academic literature database, Internet search engines, Libraries
	Materials published by professional organisations and governmental organisations
Key word term	Peer to peer economy, Collaborative economy, Platform economy, Sharing economy, Robotisation, Automation, Industry 4.0, Digitisation, Unemployment, Artificial Intelligence, Big data, Social economy
	Data, facts, figures, features, report, file, document, evidence, details
	Advantage, discrimination, skills, education, inequalities, wealth, further education, life long learning, consequences
Filters	Five years from publication

1) Desk research will pick-up the following challenges, with a particular focus on:

The changing needs for qualification, soft skills and competences: Practices / public or private policies on career counselling at a young age and assisting them on educational and career choices (i.e. Generation Z). Informing and educating youngsters programs (especially women and other disadvantaged categories), teachers, parents and professionals on skills, opportunities and career paths, to cover the existing or the future workforce shortages. Informative and / or educational programs dedicated to Generation Z / women / disadvantaged groups on topics such as the future of work, previsions on the labour market about how digitalization will influence it and what skills are to be prioritized. Analysis of the programs that dealt with the possible effects of Industry 4.0 (Economy 4.0, Labour 4.0): M2M, M2P, new curricula. Desk research will analyse in particular the following policies and countries:

Objective 1: SOCIAL AND SOLIDARITY ECONOMY:

Good practices in relation to the social, cooperative and solidarity economy: Standard policies to fight inequality: The Netherlands, France, Germany and the Nordic Countries. Effects on reducing the Gini index: UE overall. Focus on the effects of redistribution policies through taxation: Switzerland, Netherlands, Australia, UK, Nordic Countries Germany, France, UK, Spain.

Objective 2: RE-DISTRIBUTION OF WEALTH:

Tax and transfer systems for efficient redistribution: Less earnings volatility, in most countries with unemployment insurance. Measures to increase tax compliance and marginal tax rates for the rich: Australia, Austria, Denmark, Netherlands (base-broadening measures); France, Greece, UK (tax credits reduction); Spain (reduction of personal income tax base). Increase social mobility: Australia, Ireland (substitute estate taxes with inheritance taxation). Programs to prevent long-term benefit dependence: France (RSA – combination in-work benefits + minimum income). Spain (BMINCOME project combining cash transfers and active social policies). Cyclical out-of-work benefits: France, Portugal, USA (benefits in crisis); Australia, Denmark, Switzerland (budget adaptation for active labour market policies).

Objective 3: WORK-EMPLOYMENT:

Employment promotion and good quality jobs: Programs to integrate disadvantaged persons: Switzerland, Netherlands, Australia, UK, Nordic Countries (programs of disabled); Germany, Canada (for elder worker); France (youth). Boost human capital: France (school dropouts); Australia (lifelong education). Hiring incentives: UK, France (payments); Italy (tax incentives); Germany, Australia (vocational training). Partnership between

[43] For example for Finland there will be available in 2019 a representative working condition survey including questions on robotisation and digitalisations of work. European working condition surveys and robobarometer are other examples

org. and unemployment agencies to improve service quality: Finland, Ireland, Switzerland, Australia.

Objective 4: EDUCATION AND SKILLS:

Skills and education: Investing for opportunities Standardized schooling: most OECD countries. Cash transfers to families with disadvantaged children: South Africa (investment in infrastructure quality); New Zealand (reduce dropout risk). Increase disposable income of families with school-age children: Brazil, Mexico (cash payments, conditioned on attendance); Austria, Czech Republic, Germany, Switzerland, UK (cash benefits or tax breaks for continuing education); France, Ireland, Israel, Korea, Portugal, Luxembourg (income tax reduction); Mexico, UK, USA (meal supports); Nordic countries, Australia, France, Hungary, New Zealand, Spain, UK (access to childcare). Reduction of inequality in education outcomes: Canada, Finland, Japan, Korea. Avoid job obsolesces with continuous training of employers: England, Korea. Match skills of the labour supply with the demand: Canada (immigration program).

GENDER-DIMENSION OBJECTIVE:

Increase women's participation in economic life: Right to return right after maternity leave: Canada, Korea, USA. Publicly provided reconciliation support: Nordic Countries. Equal distribution of unpaid work (e.g. paternity leave): Germany, Italy, France, UK. Mandatory female quotas for decision-making positions: France, Germany, Italy, Spain.

Interviews can be conducted concurrently with desk research and form part of case studies to allow iterative data collection.

We intend to undertake **minimum five** interviews in each EU country, as follows:

- with an expert representing a research organisation or educational institution with knowledge (area of interest/specialisation) in labour market analysis (covering the research/academic perspective);
- with an expert representing an organisation or institution with direct connection with the labour market (e.g. employer, employers' associations, trade unions etc.).

Interviews shall provide a comprehensive assessment of the impact of the technological transformation on the each of dimension analysed. An example of the interview guide structure that could be used is presented below:

[*SUGGESTED*] INTERVIEW GUIDE ITEMS	EXPECTED INFORMATION	COVERED DIMENSION
[*In your view*] which are the main effects of the new technological context [*Industry 4.0*] on the labour market in your country?	Impact of new technologies on employment and employment relationship (e.g. wages, working hours, type of work: remote work/office work, gender dimension).	Technological transformation impact on employment and labour markets
How new technological context changing labour demand for differently skilled workers?	New skills demand, pattern of demand according to occupations and skills, change in occupational and qualification structure, changes in educational and training system.	Technological transformation impact on changing labour demand for differently skilled workers
How new technological context affect wealth distribution and social welfare?	New regulation (e.g. changes in tax system), social protection and social security policies, social expenses	Technological transformation and wealth distribution and social welfare
Which developments do you expect in the field of [*social*] economy in the next five years?	New form of economy (e.g. social economy, solidarity economy, sharing economy), possible transition of the actual economy to a social economy.	Technological transformation and transition of the actual economy to a social economy
What are the policies [adopted/implemented] associated with this?	Good practices related to the management of the effect of technological transformation.	Technological transformation impact on employment and labour markets

6. [In your view] what are the policies that can be implemented?	Relevance of the policies implemented, needs for new policies.	Technological transformation impact on changing labour demand for differently skilled workers Technological transformation and wealth distribution and social welfare Technological transformation and transition of the actual economy to a social economy

Task T3.2 Identification and assessment of main key factors for success and for failure arising from these previous cases analysis (M12-15). Task Leader: USI and Task Co-leader: UVT Partners involved: UPV/EHU, DOC RI

This task will analyse relevant cases identified in the previous task 3.1. The main methodology employed for this task will be (1) to select relevant cases and to create an analysis framework (2) to apply a check-list in order to identify the key factors for every case study and (3) to measure the performances in order to create a ranking useful to classify the policies:

1) Framework:
   1. Create a preliminary pool of cases to be taken into consideration for the analyses.
   2. Establish the criteria/define a framework based on which the most relevant cases will be selected and further analysed following the four dimensions described in WP2.
   3. Define proper scales to analyse the cases.
2) Identification and evaluation based on:
   1. Commitment elicitation from the team members, clients, top management and all stakeholders.
   2. Projects goals and deliverables are specific, measurable, attainable, Relevant and time-bound (SMART).
   3. Good project leadership.
   4. Best practices taken in consideration.
   5. Proper risk management policies.
   6. Proper project planning.
   7. Communication.
3) Assessment:
   1. To define on how the metrics for measuring the progress of the critical goals and how they would be monitored.
   2. To measure consensus, amongst the stakeholders, clients, and the project team.
   3. To perform a cross examination of project's individual goals.

Deliverables

D 3.1: Database on relevant practices implemented in Europe to bridge the existing gaps in relation to each of the four dimensions of study (M12). Database containing relevant policies implemented in Europe in relation to each of the four dimensions of study; a Best Practices / success stories map on the globe, on each of the 4 dimensions; a Failed Cases map on the globe (and the reasons behind).

D 3.2: Report on the identification of key factors to bridge the existing gaps in relation to each of the four dimensions of study (M15). Report containing the methods used for the identification of key factors and the result of the analysis,in relation to each of the four dimensions of study; a logic graphic to show the identified interconnections between factors and each dimension.

Work package number	4			Lead beneficiary				PKT		
Work package title	Development of alternative future scenarios									
Participant number	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**
Short name of participant	UPV /EH	TEC NAL	IBEI	UVT	EUR ICS	IEP BX	BIP A	UPF	RIP ESS	PKT	UED IN
Person months per participant:	8	1	1	1	1	1	1	1	1	17	1
Participant number	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**	**21**	
Short name of participant	YF	WE ROI	USI	GN	RSA	UB	CNR S	UY ORK	DOC RI	ORE KA	
Person months per participant:	4	1	1	1	1	1	1,5	1	1	1	
Start month	12			**End month**			22				

Objectives

The main aim of this WP is to define different possible future scenarios for each of the dimensions analysed, taking into account the socioeconomic impacts and key factors identified in previous WPs, in order to assess the validity and feasibility of these key factors in different future contexts. A most probable and desirable scenario will be selected. These scenarios will present different projections in the medium/long term, starting from other relevant scenario references such as "Europe 2025" (The White Paper on the Future of Europe, EC) and "The future of work & technology 2050" (The Millennium Project), as a framework for the proposal of the strategic approach that will include specific policy interventions and measures in the following WP5. In order to ensure the co-creation approach along the whole project it will be key in this WP to engage with stakeholders and communities to start the development of new flexible methodologies that creates a dynamic and sustainable social innovation platform. For future use after the project ends ensuring the final Strategy leads to an inclusive socioeconomic model that guarantees equality, equity, justice and sustainability.

Specific objectives include:

1. To identify and define different alternative projections of identified impacts and key factors (variables) in different future contexts, according to the dimensions of study.
2. To analyse and assess the interactions of different impacts and key factors.
3. To engage with key stakeholders and communities to co-define the key factors and scenarios and ensure a co-creation approach that will be engaging, supportive and fully-inclusive.

To select the most probable and desirable future scenario.

Description of work

In order to achieve these objectives, the following tasks will be carried out:

Task T4.1 Definition of the scenario space taking into account previously identified impacts and key factors (Months 12-14) Task leader: PKT Partners involved: UPV/EHU

To construct scenarios and strategies, we need such simple and rational tools in order to stimulate imagination, to improve coherence and to facilitate appropriation. For that reason, we will use the strategic foresight toolbox by Michel Godet which classifies problem-solving methods as follows:

1. Asking the right questions and identifying the key variables: futures workshops and structural analysis;
2. Analysing trends and actors' strategies: based on inputs from WP 2 and WP3;
3. Reducing uncertainties to likely scenarios: morphological analysis, experts methods;
4. Identifying and assessing of strategic options.

In practice, there is no one scenario method, but rather a variety of methods of construction (certain simplistic, others sophisticated). However, a kind of consensus seems to have been reached that the term 'scenario method' only applies to an approach which includes a number of specific steps:

1. Define the system and its environment,
2. Determine the main variables,
3. Analyse the actors' strategies.

In order to implement point 1, structural analysis proves a valuable and standard tool. This structural analysis will be based on the results of WP 2 ("Final Report on Socioeconomic Effects of Technological transformations") and WP 3 ("Report of identification of key factors"). Additionally, theses previous analysis will allow the identification of the dynamics of the changing system and the productive or counter-productive role of certain actors. Moreover, each actor must be defined according to his or her objectives, problems and means of action. We must then examine how the actors position themselves with respect to one another. To achieve this, we can draw up a table showing the actors' strategies.

Task T4.2 Definition and description of alternative projections for each of the previous variables (impacts and key factors) (Months 14-16) Task leader: PKT Partners involved: UPV/EHU

Alternative projections will be made for each of the defined variables (impacts and key factors), taking into account the different dimensions. These variables may include the definition of different policy interventions and measures, fact that will facilitate the proposal of specific policy interventions and measures in WP5.

Once the key variables have been identified and the actors' strategies analysed, possible futures can be listed using a set of hypotheses which points to a continuation of a trend or, on the other hand, its cessation. In this case, morphological analysis can be used to break down the system under examination into essential dimensions and then study a possible recombination of the different dimensions, such a recombination comprise as many visions of the future as possible.

Task T4.3 Co-defining the interventions with the Consortium partners and other relevant stakeholders, communities and citizens (Months 16-18) Task Leader: YF Partners involved: [ALL]

At this stage, the scenarios for the future are still embryonic since they are restricted to sets of hypotheses, whether implemented or not. The next stage is to describe the route leading from the present situation to the final visions retained. Certain parts of the system's evolution may lead to adjustment of partial models and be processed by computer. However, the figures produced in this way should be seen as indicative only; they serve to illustrate system changes and enable a certain number of coherence checks to be carried out.

The participation of stakeholders, communities and citizens at this point of the process is very important in order to guarantee that the scenarios that we build consider everybody's vision concerning the technological transformations' impacts on the society and on the economy.

The ToShare co-creation approach will ensure the involvement of key stakeholders and communities and will be engaging, supportive and fully-inclusive based on social innovation methods. The process, tools and methodologies will be defined in WP7 and the ones related to the definition of the future scenarios applied here.

Moving from anticipation and prospective thought to strategic action presupposes appropriation on the part of the actors involved at each and every moment. The co-creation approach in ToShare will ensure the local stakeholders and communities - not only the policy makers - are involved to the utmost in the different phases without, however, altering the necessarily confidential character of some strategic choices. To move from the act of thinking to action itself, it is necessary to appropriate.

In order to enable and enhance participation of interested stakeholders in the foresight process, the consortium will set up a direct interaction through the ToShare platforms in line with WP7. The different communication platforms (website, social media, intranet) will offer the partners and all other interested stakeholders the access to the strategic foresight process, with the variables/interventions and user guidelines. Through the different platforms, stakeholders will be asked to assess which factors they find more relevant or will have more effects in the future. The interested organisation, citizen or stakeholder will be able to choose the specific indicator(s) for the variables which he/she considers to be most important. Further on, the user will be able to insert the actual or imaginary (desired in the future) values of indicators selected, in order to set up the pilot future development scenario. As well as this, several futures workshops will be organized, one by partner country in line with WP7.

Task T4.4 Alternative scenarios building (Months 18-20) Task Leader: PKT Partners involved: UPV/EHU, YF

A scenario is the set formed by the description of a future situation and the course of events that enables one to progress from the original situation to the future situation.

Transformative scenarios are the most challenging category of change due to the multi-level transition required in society in terms of the economy, politics, technology and socio-cultural changes. It is important to understand that instead of assuming linearity and a fixed pathway for future developments, multiple futures can be envisioned. By this, it is meant that several types of ways through which a positive and preferred future could be realized. This futures-orientedness can address different stakeholders and enable them to identify relevant connection points of their work and future opportunities. The challenges of short-termism and lack of innovative thinking can be overcome, when appropriate tools are employed to open mindsets and explore avenues of future collaboration and co-creative innovation.

The research proposal builds on the driving ideas of co-creative innovation as a tool for transformation. The co-creation approach through workshops with stakeholders and communities using the tools and methods of social innovation designed and delivered. These will be part of the cross-cutting co-creation process which aims to create a dynamic and sustainable social innovation platform for future use after the project ends. We can engage pro-actively with target audiences through ethnographic and participatory research collating and analysing opinions, suggestions and associated ideas/innovations stemming from the results of the project findings. In support, future-oriented knowledge creation and innovation systems are part of the cross-cutting themes in the proposal, and thematically integrated into the assessments of the individual work packages. Futures studies methods such as futures workshops and futures literacy are inter-disciplinary and open for participation by nature and designed to flexibly include the broadest possible number from within the project and external key stakeholder groups. Futures workshops are organised as a co-creative platform and typically strengthen the abilities of the participants to identify solutions and envision necessary change. Futures workshops, one per partner country, will be designed with the teams working in WP7 incorporating their questions and hypothesis. At the same time, the results of the futures workshops will be inputs for their work. Practices of co-creation and innovation will set a benchmark for the whole of the consortium as well as the interaction and engagement with policy-makers for a courageous new vision.

Task T4.5 Selection of the most probable and desirable scenario (Months 20-22) Task leader: PKT Partners involved: [ALL]

Including stakeholders and communities in the selection process (definition of the assessment criteria).Classically, a distinction is made between the following: possible scenarios (everything that can be imaged), realisable scenarios (all that is possible taking account of constraints), desirable scenarios (which fall into the possible category, but which are not all necessarily realisable).

According to their nature or their probability, these scenarios may be termed ‘reference’, ‘trend-based’, ‘contrasted’ or ‘normative’. In principle, a trend-based scenario, whether or not it is probable, corresponds to the extrapolation of trends at all points where choices are to be made. It is among the realizable scenarios, which have a higher than zero probability, that we find contrasted (unlikely) scenarios and the field of development where the most probable scenarios are found. As regards desirable scenarios, these are found certain where within the possible zone, and are not all necessarily realizable. Thus, we look for a realizable and desirable scenario and with that aim, it is necessary to define the assessment criteria and the assessment process for the selection of the most probable and desirable scenario. This assessment and selection will be made through the Delphi Method, that will enable us to reduce uncertainty by estimating the subjective probabilities of the different scenarios occurring or different key events for the future.

Deliverables

D 4.1: Manual for the scenario building methodology to follow (Month 14). Guide document including methodological step to complete a scenario process.

D 4.2: Report of projected variables (impacts and key factors) (Month 16). Report on the results on the classification and selection of strategic variables.

D 4.3: Report of the results of the stakeholders contrasting process (Month 18). Report including the conclusions

of the stakeholders contrasting process.

D 4.4: Alternative Futures scenarios report (Month 22). Report describing the different scenarios, including the desirable scenario.

Work package number	5			**Lead beneficiary**				UPV/EHU		
Work package title	Definition of the Strategy: policy interventions and measures for each of the analysed dimensions									
Participant number	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**
Short name of participant	UPV /EH	TEC NAL	IBEI	UVT	EUR ICS	IEP BX	BIP A	UPF	RIP ESS	PKT	UED IN
Person months per	20	5	3	1	3	3	1	3	3	2	1
Participant number	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**	**21**	
Short name of participant	YF	WE ROI	USI	GN	RSA	UB	CNR S	UY ORK	DOC RI	ORE KA	
Person months per	3	1	1	1	1	4	6,5	1	1	1	
Start month	18			**End month**				34			

Objectives

The aim of this WP will be to define a first draft of the Strategy that will include specific policy interventions and measures for each of the analysed dimensions, to address the identified opportunities, challenges and gaps arising from technological transformations' impacts in Europe. In this WP we will engage with stakeholders and communities, the ones already engaged in WP4 and/or new ones, and will ensure their capacity building enabled by a dynamic and flexible "building blocks" co-creation approach based on social innovation methods throughout the Strategy definition (WP5) and piloting processes (WP6). This Strategy proposal, leading to an inclusive socioeconomic model that may guarantee equality, equity, justice and sustainability, will be based on the selection and definition of the most probable and desirable scenario, out of the alternative future scenarios built in WP4.

The specific objectives addressed in this WP:

1. To identify and define different policy intervention and other kind of measures that will address the selected scenario, in order to be able to enhance the identified opportunities, face the challenges and bridge the existing gaps.
2. To engage with key stakeholders and communities to co-design policy interventions and measures and ensure a co-creation approach that will be engaging, supportive and fully-inclusive. Capacity building of local stakeholders, communities and citizens, addressing their specific needs and expectations.
3. To draft the Strategy that will contribute to the development of a new economic and social model consistent with the environment of the fourth industrial revolution.
4. To agree on the Final Strategy that will enable a new economic and social model consistent with the fourth industrial revolution, after the implementation of the activities in WP6.

Description of work

The following tasks will be developed in this WP:

Task T5.1 Proposal of policy interventions and other kind of measures to be implemented in different dimensions, in accordance to the selected scenario (M18-24) Task leader: UPV/EHU and Task Co-leader: TECNALIA Partners involved: IBEI, UB, UPF, CNRS, IEPBX, EURICSE, UYORK, PKT

Considering the previous work (identified needs in WP2, good practices in WP3 and the scenario in WP4), this

task will outline the policy interventions and measures that will contribute to a diverse, inclusive, sustainable and smart Europe.

Policy interventions will be classified in four broad categories: measures to enable the transition from the actual economy to a social solidarity economy, measures for the redistribution of wealth, measures to transform education and training systems and, finally, measures to improve the employment and labour markets. Gender sensitive and gender specific measures will be outlined across the four categories.

The particular field for which the policy will be formulated will be first identified taking into account the objectives of ToShare as well as the needs of the society. The alternative policies that are available will also be analysed and the selected measures will ensure that the objectives are met.

These interventions/measures will include (but will not be limited to) the following areas:

- Gender aspects: conciliation of personal and work life, gender pay gap, social responsibility of care work, female precariousness, unemployment and poverty, women's leadership in new social and economic models, and gender transformative education models, among others
- Tax and benefits policies that could lead to a fairer distribution of gains.
- Implementation of a universal basic income.
- How to transform education and training systems in order to address evolutions in the content and organisation of work
- Employment promotion and good quality jobs
- Schooling
- Tools/ways of measuring new skills to provide verifiable data of trusted quality.
- Matching skills in labour market supply and demand.
- The development of the collaborative economy or the platform economy
- Social investment and social protection policies and inclusive business models (e.g. social economy, social enterprises) that can lead to human capital growth and productivity gains while promoting access to labour markets and social wellbeing.
- Social mobility and labour market polarisation (in job quality, wages, social security coverage etc.) arising from the technological changes.
- Relationship between technology, productivity gains and work-life balance including the availability and use of non-work, discretionary time.
- Occupational health and safety issues resulting from technological transformations.

Whenever possible, existing tools and outputs of other on-going EU projects will influence this first policy drafting. This is the case for example of datasets such as PIAAC or the pilot project 'Real Time Labour Market Information on Skills Requirements' in which the Cedefop is currently working on.

This task will result in the definition of the first draft of the Strategy which will consist of a compilation of measures and interventions organised by the four dimensions and detailing for each of them the objectives, the potential impact, the appropriateness and the areas/ agents involved.

Task T5.2 Co-design of the Strategy with relevant stakeholders and communities (M25-27) Task leader: YF Partners involved: [ALL]

At this stage it will be vital to receive contributions to the Strategy from the relevant stakeholders and the citizenship. We will design and deliver workshops in different regions in Europe using social innovation methods and tools where local key stakeholders and communities will participate and co-design the interventions and measures of the Strategy.

The capacity building of local stakeholders, communities and citizens will be enabled by a dynamic, inclusive and flexible "building blocks" co-creation approach based on social innovation methods throughout the Strategy definition design.

While framing policies we must ensure that stakeholders in their diversity are involved in the process at all levels and stages. If the measures or interventions are created without being aware of the views of the persons for whom these policies are being created, it is likely that the policy may not be successful in achieving the desired results. Therefore in order to ensure the successful implementation of policies, participation is required while creating the policies. Indeed, public opinion must be considered when devising policy actions; the most well-intentioned and well-crafted policy may founder in the absence of public support.

From the varied pool of participants, context-rich and practical applicable information will be gathered, the

results of which will be developed into regional workshop reports which will then be used to refine the Strategy.

Task T5.3 Collection of feedback and adaptation of the Draft Strategy (M28-29) Task leader: UPV/EHU

The first draft of the strategy will be adapted to meet the requirements of the stakeholders and the citizens. Once the interviews and the workshops are finished, we will be able to modify the strategy accordingly. The co-production approach of task 5.2. will guarantee that the proposed interventions address the needs of all stakeholders and society.

The WP leader will ensure the consistency of the measures proposed. The different policies to be implemented should confirm with each other. In case of inconsistency, the policies cannot be adopted properly, therefore it is very important to make sure that the policies do not provide any conflicting guidelines.

The task will end with a second version of the Strategy containing a wide range of interventions, including 'mainstream' interventions and highly targeted interventions that will be delivered to the Regions responsible for the piloting.

Task T5.4 Adaptation of the Draft Strategy according to the assessment made in WP 6, for the definition of the Final Strategy that will enable a new economic and social model consistent with the fourth industrial revolution (M31-34). Task leader: UPV/EHU Partners involved: Tecnalia, CNRS, YF

The testing of the interventions carried out in WP6 and the assessment that will be done at the end will nourish this task that consists on defining the Final Strategy for a new economic and social model consistent with the fourth industrial revolution.

Indeed, once the UBI toolkit of WP6 and other measures or interventions have been tested, we will be in a position to showcase how the policy has met (or not) the objectives for which it was created. WP6 will bring evidence on the policy effectiveness and the cost effectiveness. At the same time, when the policy and toolkit have been implemented on a trial basis, valuable suggestions may be received from other stakeholders and these inputs can help in introducing the necessary changes in the strategy due to which it becomes even more effective. Therefore, it is very important that the policy addresses well the objectives, otherwise a new policy will be considered. The quantitative and qualitative impact, the side effects, the lessons learned and the viability will be taken into consideration as well. It is likely that there will be positive synergies between policies, for example education and employment measures that when implement together multiply the effects.

The final strategy will therefore contain the final version of the policy interventions (modified and new) which we suggest implementing in order to address the socioeconomic effects of technological transformations.

Deliverables (brief description and month of delivery)

D 5.1: 1st Draft of the Strategy (Month 24). Document outlining the first draft of the Strategy

D 5.2: Feedback report on the 1st Draft of the Strategy from stakeholders´ consultation (Month 27). Summary of feedback received on the outline and ways, changes made to incorporate feedback

D 5.3: 2nd Draft of the Strategy (Month 29) Second version of the strategy that incorporates feedback

D 5.4: Final report of the Strategy that will enable a new economic and social model consistent with the fourth industrial revolution in Europe (Month 34) Final strategy that incorporates also main outcomes from other WP results

Work package number	6		**Lead beneficiary**			RSA		
Work package title	Design and evaluation of basic income experiments: a tool kit							
Participant number	**1**	**11**	**12**	**15**	**16**	**19**	**20**	**21**
Short name of participant	UPV/ EHU	UEDIN	YF	GN	RSA	UYORK	DOCRI	OREKA
Person months per participant:	2	11	2	6	16	1	4	0,5
Start month	15		**End month**			32		

Objectives

There is unprecedentedly high international interest in basic income. Particularly over the last two years this interest has grown exponentially, resulting in a number of investigations into the idea's potential feasibility and efficacy[44]. This has drawn the attention of policy-makers searching for possible answers to a variety of systemic challenges. Although an old concept, its contemporary relevance is rooted in its promised multidimensional and ameliorative impacts, including on economic insecurity, savings and debt, inequality, mental health, (automation-induced) scarcity of employment, the experience of stigma, women's empowerment and poverty as well as on unpaid care work. These are all issues of primary importance to the modern socio-political economy, and critical components of the move towards the Fourth Industrial Revolution. They align strongly with the overarching trends being investigated by the ToShare project, and pose both challenges and opportunities for the various economic and social aspects identified.

This WP will aim to strengthen the current discussion of basic income and its impact on the future of work, economic activity and social security, building upon work undertaken in WP 5.

Additionally, it will look to connect the basic income discussion with the key areas it could have significant impacts upon, including the aforementioned themes of the future of work, economic insecurity, redistributive and inclusive economics, gender, and democratic engagement, among others.

Key Objectives will be:

1. Evaluating and categorising typologies of basic income-type experiment designs, based on an extensive literature review and analysis of historical and contemporary basic income-type experiments around the world. This will include: i) summative assessment, including basic income's potential direct and indirect impacts on recipients as well as the policy's interactions with other dimensions like the labour market, fiscal measures and education; ii) formative assessment, evaluating experiments' implementation practices and research methodologies with an eye to defining best practice and aid the development of new techniques;
2. Create a toolkit of resources for developing and delivering experiments under these various typologies, in order to support a better structured, well-defined and temporally, disciplinarily and pragmatically co-ordinated range of experimentation practices and evaluations;
3. Identify key practitioners, research bodies and delivery groups in the field, across Europe and the rest of the world; and create a new global network and hub for sharing research methodologies, evaluation frameworks, impact assessments and policy variants.
4. Depending on external circumstances, apply the objectives above on the ground experiments, including Navarra, as well as other potential cities and regions (Aquitaine in France, from Scotland and others), depending upon the progress of experiment ideas. Here other experimental practices will be tested, arising from WP5.

Description of work

The following tasks will be developed:

Task T6.1 Evaluate and Categorise Basic Income Experiment typologies (M15-M20) Task leader: RSA Partner involved: DOC RI

This piece of work will build on existing expertise at the RSA to create a robust framework of typologies for basic income-type experiments. The typologies will be built from identified key design principles of experiments, including which principles of basic income are utilised – e.g. unconditionality, individual payments and non-withdrawability. This requires the classification of the key characteristics of basic income experimental design architectures. The typologies framework will be expanded on to include the barriers and opportunities present in each experiment type (e.g. saturation sites vs. distributed randomised control trials); best practices for experiment implementation; forecasting of costs and ideas for funding sources; pathways for summative assessment of impacts – including second order factors; and formative experiment evaluations. A significant number of basic income-type experiments have been undertaken in various parts of the world (incl. US, Canada, Namibia, India, Kenya), with others currently running (incl. Canada, Finland and the Netherlands) while others are under development or consideration (incl. Spain, Serbia and the UK). Lessons from all of these will be

[44] http://basicincome.org/news/2017/10/overview-of-current-basic-income-related-experiments-october-2017/

collected, aggregated, classified and drawn together in a holistic analysis. It will also clarify the difference between pilots (which seek to test basic income as fully as possible) and experiments (which explore specific aspects of basic income).

This work will include: desk based research of existing literature and case studies; interviews with key figures involved in the delivery and/or evaluation of past and present basic income-type experiments; production of a typologies report which categorises the various formats of experimentation.

TASK T6.2 Investigate interactions between basic income and dynamics of the welfare state (M18-23) Task leader: RSA Partners involved: UEDIN, UPV/EHU, UPF, UYORK, DOC RI

Previous scholarship on universal basic income has largely drawn attention on normative justifications for universal basic income and to some extent its positive economic and political feasibility. However, there is a crucial lack of policy relevant research considering basic income and existing welfare-state institutions on very concrete level. By analyzing different welfare-states and their social security environments, this task provides an understanding of how different basic income models might interact with existing social policy institutions. These studies will consider the 'fit' between different welfare-states and key principles of basic income so as to allow for the accumulation of significant comparative knowledge on how different welfare-states models and regimes are likely to interact with different basic income models. This task will scrutinize the characteristics of social policy institutions that are basic income 'friendly'. This will help identify idiosyncratic challenges for basic income pilot projects and, more broadly, the possible implementation of basic income in different socio-political landscapes. These analyses would provide important material for the basic income toolkit and the global knowledge-sharing platform created in Task 6.3, as well as laying the ground for Task 6.4.

This work will include: case-specific research on legislation, policy documents and political debates in relation to basic income; production of comprehensive case material for the BI toolkit as a basis for Task 6.4. Pilot testing

Task T6.3 (i) Create BI Toolkit and (ii) Establish Global Knowledge Sharing Network (M23-28) Task leader: RSA Partners involved: UEDIN

The BI Toolkit will build upon the resources developed in Tasks 6.1 and 6.2 as well as the key areas identified in WP5. It will include development of a user friendly, open access toolkit to support the design, delivery and assessment and evaluation of basic income experiments. This will include models for micro-experiments; as well as larger-scale experiments. It will tap into the expertise of the RSA, including RSA Labs and their programme of design-led system change; and the practical and academic skills and expertise of the University of Edinburgh, particularly around evaluation.

The Global Knowledge Sharing Network will provide a hub through which policy-makers, academics, researchers and civil society can collaborate. Basic Income Earth Network (BIEN) already operates as a global network of basic income advocates, and there are examples of collaboration between different basic income researchers, but a gap exists when it comes to the systematic sharing of knowledge, influence and, crucially, data in order to best shape policy and impact. This piece of work will therefore look to create a global Knowledge Sharing Network to act as this repository and responsive hub of expertise. Creating it will also provide a space for micro-experiments to pool their findings with others, allowing for their data to have much greater relevance than it would do in isolation. This will build upon the RSA's global presence (over 29,000 Fellows in over 80 nations) and the work we have already been undertaking as collaborative facilitators of basic income research and thought leadership.

This work will include: Desk based research; Design-led workshops; Production of an accessible BI Toolkit; Online webinars and workshops; Creation of a Knowledge Sharing Network brand and resources

Task T6.4 Real World Toolkit Testing in Experimental areas and other piloting initiatives arising from WP5 (M26-32) Task leader: RSA Involved partners: YF, GN

This Task will draw together the outputs of Tasks 6.1, 6.2 and 6.3 into real basic income experiments, underpinned by a set of best-practice guidelines, gold-standard implementation, assessment and evaluation strategies, a high-level collaborative knowledge hub and a responsive technical and logistical support network, for the duration. With so much international interest in basic income, we will look to test, refine and deliver the various tasks of this WP in real world experimental settings, including Navarra (partner of this Consortium), and potentially other cities and regions (from Scotland, Aquitania and others); and developing opportunities such as micro-experimentation in English cities such as Bristol. We will work with other ToShare partners such as the

Young Foundation to learn from the work they have been undertaking, and to ensure that the testing contributes to the other WPs. Currently, it is uncertain when each of the prospective experiments may begin. This sits outside of the control of the ToShare project. We do, however, have strong connections with some of the governments currently developing basic income experiments and will look to develop links with other relevant experiments. In each location, local partners and stakeholders will be identified to help deliver the experiment and build capacity for productive engagement. This will utilise the RSA's global presence and expertise in basic income, and the University of Edinburgh's expertise and research capacity, particularly in relation to use of appropriate evaluation tools. It will examine a range of different interventions in practice, rooted in the resources created in the output of previous tasks, specifically the UBI Toolkit and previously identified in WP 5. This will also open up space for evaluating other parts of the ToShare project in practice, such as measures to promote Social Economy companies and gender impacts of new social policies, alongside the basic income work.

This work will include: Desk based research; Creation of evaluation resources; Stakeholder engagement in target areas; Organising and hosting deliberative, participative workshops; Publishing of Case Studies; Publication of a final Evaluation Report based on the various tools identified.

Deliverables (brief description and month of delivery)

D6.1 Basic Income Typology Report (M20). Report describing the different possible basic income schemes, including strengths and weaknesses of each typology.

D6.2 Basic Income Toolkit (M26). Methodology document that describes different tools and procedures to design and implement basic income policies at local and regional level.

D6.3 Launch of Global Knowledge Sharing Network (M28). Global network and hub for sharing research methodologies, evaluation frameworks, impact assessments and policy variants.

D6.4 Final Basic Income and other Strategic Measures Evaluation report (M32). Report including main conclusions of the work package and various relevant tools identified during the process.

Work package number	7			**Lead beneficiary**				YF		
Work package title	Co-creation approach, engagement, dissemination, communication and exploitation									
Participant number	**1**	**2**	**3**	**4**	**5**	**6**	**7**	**8**	**9**	**10**	**11**
Short name of participant	UPV /EH	TEC NAL	IBEI	UVT	EUR ICS	IEP BX	BIP A	UPF	RIP ESS	PKT	UED IN
Person months per	5	4	2	4	2	2	3	2	2	4	2
Participant number	**12**	**13**	**14**	**15**	**16**	**17**	**18**	**19**	**20**	**21**	
Short name of participant	YF	WE ROI	USI	GN	RSA	UB	CNR S	UY ORK	DOC RI	ORE KA	
Person months per	16	6	4	2	4	2	2	2	3	0,5	
Start month	1				**End month**			36			

Objectives

This WP is critical to the overarching success of the project; it is key to ensuring the co-creation approach along the whole project and consequently the engaging with key stakeholders and communities to develop new flexible methodologies that creates a dynamic and sustainable social innovation platform for future use after the project ends. The overall aim of WP7 is to coordinate and facilitate the ToShare co-creation approach that will be engaging, supportive and fully-inclusive involving all stakeholders and communities ensuring the final Strategy leads to an inclusive socioeconomic model that guarantees equality, equity, justice and sustainability.

This WP will also develop a dissemination strategy to maximise its outreach across all sections of society. This WP will also ensure the communication and sharing of the progress and results of WPs as well as facilitate the interactions of the interlinked task mutually reinforcing, such that we can create robust outputs and higher impact. The main aims of this WP are:

- To define, enable and facilitate the co-creation framework and activities.
- To communicate and disseminate the key findings and policy recommendations to relevant audiences and networks reaching the regulators and policy-makers community
- To support the internal communication and facilitate the interaction between interlinked tasks.

The specific objectives are:

- To build capacity of local stakeholders, communities and citizens enabled by a dynamic and flexible "building blocks" co-creation approach based on social innovation methods throughout the Strategy definition and piloting processes.
- To ensure that women's voices are heard, and their representation and influence is increased in policy dialogue.
- To disseminate the findings and conclusions related to the research carried out in the ToShare Project, on an ongoing basis throughout the life of the Project and in a gender-sensitive manner.
- To establish the most appropriate channels of communication and their corresponding online and offline strategies to reach the Project's target audiences: research communities, European Commission policymakers and Civic society, Citizens, etc. Paying special attention to digital communication tools and strategies.
- To define the design and development needs (web, app, intranet, etc.), as well as the type of visual materials required in each of the key communication pieces creates as part of the Project (triptychs, videos, infographics, etc.).
- To establish the most appropriate measurement criteria, as well as the KPI's for reporting the results of communication, dissemination and exploitation, to ensure the correct functioning of the proposed strategies.
- To engage proactively with target audiences through ethnographic and participatory research collating and analysing opinions, suggestions and associated ideas/innovations stemming from the results of the project findings.
- To provide gender-sensitive feedback on the conclusions of the different dimensions analysed in the Project through feedback obtained by means of the communication strategies in place.
- To coordinate and ensure the proper functioning of internal communication, both among the partners of the consortium as well as with other parties involved occasionally or continuously throughout the duration of the Project.
- To train, guide and advise the parties involved in the Project in communication matters, by creating templates, guides of good practices and agile methodologies to promote the correct internal and external communication flow of the Project.

To widely share and transfer ToShare knowledge portfolio and case studies. Engage new audiences at local and regional level by translating and disseminating the outputs and learning, through innovative events/session (co-design workshops, policy-master classes, seminars/webinars, etc), capacity-building and learning materials (modules, manuals), policy-guides (including policy recommendations and tools) and online dissemination.

Description of work (where appropriate, broken down into tasks), lead partner and role of participants)

Task T7.1 Co-creation framework and activities. (Months 1-36) Task leader: YF Involved partners: UPV/EHU, CNRS, PKT, RSA

Through the defined co-creation approach stakeholders, communities and citizens will be engaged in the process of the scenario selection and Strategy definition (WP3, WP4, WP5 and WP6). The key stakeholders will be identified and engaged to take part in Tasks in WP4, WP5 and WP6 related to the co-creation approach and their involvement in the process. They will actively participate in the co-definition of the scenarios and interventions and measures of the first draft of the Strategy. Social innovation workshops will be designed and delivered in order to develop this activity, capture their inputs and engage them in ToShare project.

Throughout the project we will monitor and evaluate the co-creation approach development. The aim will be on

understanding barriers and drivers of collaborative and participatory processes for engaging stakeholders and communities.

Task T7.2 Building capacity of local stakeholders, communities and citizens through the co-production approach. (M6-M36) Task leader: YF and Task Co-leader: RSA Involved partners: [ALL]

The co-creation approach will be based on social innovation methods developed throughout the Strategy definition and the city pilots (Tasks in WP5 and WP6 related to the adaptation of interventions and measures of the Strategy and the pilots in each city). Local stakeholders, communities and citizens will be engaged to co-design and be involved in the implementation of the pilots in each city. We will involve them too in a collective reflection activity on the results of the pilots and tests and the lessons learned. This activity will feed and contribute to the final analysis of the pilot experiments.

We will identify social innovation training needs of the local stakeholders and communities for the implementation of the Strategy I&M in the selected future scenario during the pilots. Alongside to the social innovation workshops we will develop learning activities to build capacity on these key stakeholders and communities. In each pilot city we will involve local stakeholders and communities in the facilitation of the social innovation activities.

Task T7.3 Networks engagement (M1-M36) Task leader: YF Involved partners: [ALL]

The objective of this task is to identify, contact and establish lasting relationships over time with local, regional, national and international networks related to the topics addressed by the Project. The characteristics of the networks to be contacted will be: Credibility (to help convey the key messages of the Project), commitment (medium and long-term collaborations), specialization (regarding the topics dealt with in the Project and gender equality as a cross-cutting perspective/issue).

Together with WP7 partners (WPLs) we will co-create a Network Map on which we'll build and broaden the networks engagement.

To date, many of the partners of the Consortium are members of relevant networks, or have some kind of collaboration links with them, such as: EMES Network (Research Network for Social Entreprise), The European Network on Regional Labour Market Monitoring, The Millennium Project think tank, The PREPARE network, Euskampus, ARELCIT…

On the other hand, 29 entities and networks have showed their willingness to collaborate with and to support the project if it successfully evaluated, through signing a "Letter of Support" (attached to the Annex B of this application). The 5 organizations participating in the Advisory Group will facilitate too the stakeholder engagement process.

Task T7.4 Exploitation. (M1-M36) Task leader: YF Involved partners: [ALL]

We will organise a broad range of events during the term of the project. We will work with all WPs in the design of the Exploitation Plan through which we will widely share and transfer ToShare knowledge portfolio and case studies. Engage new audiences at local and regional level by translating and disseminating the outputs and learning, through innovative events/session (co-design workshops, policy-master classes, seminars/webinars, etc), capacity-building and learning materials (modules, manuals), policy-guides (including policy recommendations and tools) and online dissemination.

Task T7.5 Definition of the value proposition and pilot (M1-M36) Task leader: WEROI Involved partners: [ALL]

The project has an eminently clear objective of social impact, for which we will measure the degree to which the conclusions and proposals are applicable. To this end we will adjust or extend the value proposal according to the following scenarios:

- Cancelling part of the value proposition: Which of the Project proposals are not accepted by the target audience?
- Modify part of the value proposition: Which of the Project proposals are likely to be applied with slight modifications with respect to what was initially proposed?
- Increase the value: Which proposals not previously contemplated in the Project are key for the correct implementation of the Project based on prior pilot experiences? What value propositions, without real prior

pilot experiences, can be added based on the feedback received?

Task T7.6 Communication and Dissemination. (M1-M36) Task leader: WEROI Involved partners: [ALL]

We will develop and implement the communication and dissemination plan that will define the strategy to be carried out both internally (consortium and other collaborators) and externally (other target audiences). This plan shall set out the communication criteria relating to:

- What is to be communicated: Topics related to the progress of the Project and other issues external to it but consistent with the topic of the Project.
- How it should be communicated: Approach on each of the communication pieces and audio-visual material available or necessary to develop in order to carry out the communication.
- When to communicate it: Based on the general communications plan established. Detailed communications timing.
- Who has to communicate it: Spokespersons and authorized key people who can act as a driving force behind the Project, ensuring gender balance and women's active role.
- Where to communicate it: The most appropriate tools and channels for each of the communications carried out.
- Why and what for: Based on the KPIs set out in the communication and dissemination results report.

All the points discussed above will have clear indications of their impact on internal and external communications, since the correct functioning of the information flow among the parties directly involved in the Project (partners and other collaborators) is key to the correct functioning of external communications. The plan therefore requires a close relationship with the WP1 in order to ensure the existence of both internal and external communication perspectives.

In addition, this plan will include a strategic decision closely linked to the involvement and participation of the Project's target audience, making constant measurements of the value propositions and research findings, using agile methodologies such as interviews and questionnaires to delve into the identified target audiences.

Task T7.7 Communication target audiences (M1-M36) Task leader: WEROI Involved partners: [ALL]

In order to complete the communication and dissemination plan correctly we will define the target audience we are addressing together with all WPs and a strategy to reach them. The peculiarities and particularities of each of them will help us to adapt the messages so that they are perfectly understandable throughout the entire communication strategy. The target audiences that the Project seeks to impact are the following:

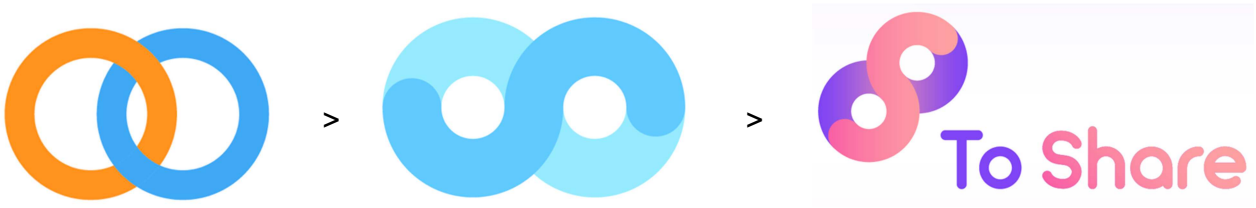
1. Key people in the dialogue involving the 4 central pillars of the project: Solidarity economy, education, redistribution of wealth, and work and employment. People with high media impact at the local, national and international levels will be sought to help convey the Project's messages and findings effectively. As previously mention, gender balance and women's active role will be enhanced. Target groups:
    - Policy Makers (at local, regional, national and European level)
    - Citizens
    - Socio-economic agents from the social and solidarity economy field (public and private institutions; ONGs)
    - Academic institutions
    - Research institutions
    - VET organizations
    - Networks
2. Examples: person 1, person 2, person 3, person 4.
3. Specialized media: Active collaboration with those media that actively support and promote one or more of the Project's dimensions (solidarity economy, education, redistribution of wealth, and work and employment). The objective is to achieve a successful dissemination among the readers of such media related to the topics covered.
4. Generalist media: Generalist media will collaborate with those generalist media, both national and international, which, despite not having as their main theme any of the topics dealt with in the Project, share an editorial line similar to the approach and objectives of the research.
5. Other past and present H2020 European projects: Collaboration with H2020 projects partially or fully related to the subject matter of this research, in order to join efforts, analyse their successes and failures in the field of communication, and learn from their experiences.

6. Society in general, recognising its diversity. As the final beneficiary of the implementation of the conclusions obtained in the project.

Task T7.8 Brand and corporate visual identity (M1-M6) Task leader: WEROI

One of the main tasks to be carried out throughout the Project is the conceptualization and design of a logo, as well as its applications and usage styles. We will design a Project logo that will be accompanied by a style manual for internal and external use, to ensure the correct application of such brand and logo across all communication media used.

Below a first proposal.



Other colour variations could be as follows:

The main values that this brand has to reflect are: Solidarity economy, redistribution of wealth, decent work and employment, inclusive education, and gender equality.

Task T7.9 Definition of key internal and external communication tools and processes (M1-M6) Task leader: WEROI Involved partners: [ALL]

We will define and implement the key tools to be developed for the proper functioning of internal communication (intranet, information exchange tool, ftp for fast loading of bulky files, etc.) and external communication (web, social networks, blog, etc.).

In addition, a methodology and clear internal communication templates will be developed and implement to ensure the correct flow of information within the Project, as well as the guidelines detailing the best practices to be consider in external communications.

- Web: A website will be designed and developed to help centralize all communication actions of the project in a single online platform. This website will be continuously updated with the progress of the Project (conclusions, new findings, etc.). In addition, the website will have a clear focus on receiving feedback from the target audience, with the aim of obtaining feedback for the project from the opinions and suggestions of visitors. Some of the key sections of the website will be the following: A description of the project, objectives, structure, consortium, agenda, public deliverables, etc.
- Blog: As part of the bidirectional communication strategy that is sought (not only from the Project to the target audience, but also vice versa), a blog strategy is proposed in which visitors can interact with the content published in the Project. In this blog, visitors will be able to evaluate the content shared by those parties responsible for the project (to measure the satisfaction or dissatisfaction that each of the proposals generates), they will be able to comment on such content (to measure the qualitative opinions expressed by users), and they will even be able to create debates between users and the parties responsible for the project, in order to generate public debates.
- Newsletter: Automatic periodic communication piece sent by e-mail to those people who have shown interest in being informed about one or more of the dimensions dealt with in the Project.
- Intranet: The intranet will be an internal communication space, accessible only with the express authorisation of those responsible for the Project. The purpose of this intranet is to have a support that is digital and accessible from anywhere in the world, which compiles the documentation for internal use of the Project,

such as possible events to attend, communication templates, public and private deliverables, news and alerts to members, etc.
- Social networks: If we view the web as the platform that will host all the communication resources of the Project, social networks will serve as communication channels through which to reach our target audience. The selection of these channels will be based on the communication objectives defined, as well as the variety of target audiences to impact with Project. Some examples: Twitter, for contact with the media; LinkedIn, for contact with specialized journalists and key people in each topic dealt with in the Project; Facebook to reach society in general; etc.
- Events: Online and offline events will be the meeting point face-to-face with the different target audiences of the Project. These events will be considered as internal events (organized by the Project managers in collaboration with partners) and external events (organized by other players related to the dimensions addressed by the Project).
- Final Conference: A final meeting will be held to which different target audiences will be invited, in order to make known the conclusions of the Project.

Task T7.10 Definition of the audio-visual material to be developed (M1-M6) Task leader: WEROI

We will create audio-visual material for the communication and dissemination, and exploitation plan that will ensure the value proposition and conclusions of the Project are clearly communicated, making clear reference to the available options (video, infographics, white paper, etc.), in order to have a forecast of the necessary material to be developed throughout the Project.

- Presentations: For online (social networks, media) and offline (conferences, workshops, etc.) communications
- Infographics: To help the correct understanding of communication pieces with high data content.
- Videos, posters, etc.

Deliverables

D7.1 Co-creation methodologic frame and plan (M6). Report describing how (social innovation methods and tools) the stakeholders, communities and citizens will be engaged throughout the process, participating in the co-definition of the scenarios and interventions and measures of the first draft of the Strategy; and how capacity building in these stakeholders and communities involved along the process will be achieved.
D7.2 Co-creation approach report and toolkit (M15, M25, M35). Report including the progress of the implementation of the co-creation approach plan and the implementation of social innovation methods and tools as well as it adaptations to the different contexts.
D7.3 Co-creation approach evaluation (M34). Report including the evaluation of the co-creation approach development, to understand the barriers and drivers of collaborative and participatory processes for engaging stakeholders and communities.
D7.4 Communication and dissemination plan, updated annually (M4, M13, M25, M32). Communication and dissemination plan that will define the strategy to be carried out both internally (consortium and other collaborators) and externally (other target audiences).
D7.5 Exploitation plan, updated annually (M4, M13, M25, M34). Exploitation Plan through which we will widely share and transfer ToShare knowledge portfolio and case studies; engage new audiences at local and regional level by translating and disseminating the outputs and learning, through innovative activities.
D7.6 Initial network map and plan, updated annually (M5, M15, M25, M32). Initial Network Map on which we'll build and broaden the networks and a networks engagement plan with actions to identify, contact and establish lasting relationships over time with local, regional, national and international networks related to the topics addressed by the Project.
D7.7 Logo and project visual identity (M6). Conceptualization and design of a logo, accompanied by a style manual for internal and external use, to ensure the correct application of such brand and logo across all communication media used.
D7.8 Communication tools online (M6). Several key online tools to be developed for the proper functioning of internal and external communication (website, social media channels, blog and newsletter)
D7.9 Audio-visual content (M25, M34). Audio-visual material for the communication and dissemination, and exploitation plan, making clear reference to the available options (video, infographics, white paper, etc.).
D7.10 Final conference (M35). This event not only will showcase the results of the project but use them to enrich the discussion and reflections around future strategies in the context of the 4th Industrial revolution and

policy recommendations.

Table 3.1c: List of Deliverables[45]

Deliverable	Deliverable name	WP No.	Short name of lead participant	Type	Dissemination level	Delivery date
D 1.1	Risk Management Strategy Document	1	UPV/EHU	R	CO	M1
D 1.2.	Change Management register	1	UPV/EHU	R	CO	M1
D 1.3	Inception Report	1	UPV/EHU	R	CO	M4
D 1.4	Gender mainstreaming guiding document, updated annually	1	UPV/EHU	R	PU	M4
D 1.5	Consortium Agreement	1	UPV/EHU	R	CO	M6
D 1.6	Project Information Management Strategy	1	UPV/EHU	R	CO	M5
D 1.7	Data Management Plan	1	UPV/EHU	R	CO	M6
D 1.8	Annual and Final Report	1	UPV/EHU	R	CO	M12, M24,
D 2.1	Sustainable Growth Report	2	TECNALIA	R	PU	M8
D 2.2	Inclusive Growth Report	2	UPV/EHU	R	PU	M8
D 2.3	Smart Growth Report	2	TECNALIA	R	PU	M8
D 2.4	Final Report: Socioeconomic effects of the technological	2	TECNALIA	R	PU	M10
D 3.1	Database on relevant practices implemented in Europe to bridge	3	UVT	R	PU	M12
D 3.2	Report on the identification of key factors to bridge the existing	3	USI	R	PU	M15
D4.1	Manual for the scenario building methodology to follow	4	PKT	R	CO	M14
D4.2	Report of projected variables (impacts and key factors)	4	PKT	R	CO	M16
D4.3	Report of the results of the stakeholders contrasting process	4	YF	R	CO	M18
D4.4	Alternative Futures scenarios report	4	PKT	R	PU	M22
D5.1	1st Draft of the Strategy	5	UPV/EHU	R	CO	M24

[45] If your action is taking part in the Pilot on Open Research Data, you must include a data management plan as a distinct deliverable within the first 6 months of the project. This deliverable will evolve during the lifetime of the project in order to present the status of the project's reflections on data management. A template for such a plan is available in the H2020 Online Manual on the Participant Portal.

D5.2	Feedback report on the 1st Draft of the Strategy from	5	YF	R	CO	M27
D5.3	2nd Draft of the Strategy	5	UPV/EHU	R	CO	M29
D5.4	Final report of the Strategy	5	UPV/EHU	R	PU	M34
D6.1	Basic Income Typology Report	6	RSA	R	CO	M20
D6.2	Basic Income Toolkit	6	RSA	R	CO	M26
D6.3	Launch of Global Knowledge Sharing Network	6	RSA	R	PU	M28
D6.4	Final Basic Income and other Strategic Measures Evaluation report	6	RSA	R	PU	M32
D7.1	Co-creation methodologic frame and plan	7	YF	R	CO	M6
D7.2	Co-creation approach report and toolkit	7	YF	R	CO	M15, M25,
D7.3	Co-creation approach evaluation	7	YF	R	CO	M34
D7.4	Communication and dissemination plan (updated	7	WEROI	R	CO	M4, M13, M25,
D7.5	Exploitation plan (updated annually)	7	WEROI	R	CO	M4, M13, M25,
D7.6	Initial network map and plan (updated annually)	7	YF	R	CO	M5, M15, M25,
D7.7	Logo and project visual identity	7	WEROI	DEC	PU	M6
D7.8	Communication tools online	7	WEROI	DEC	PU	M6
D7.9	Audio-visual content	7	WEROI	DEC	PU	M25, M34
D7.10	Final conference	all	YF	OTHER	PU	M35

3.2 Management structure, milestones and procedures

3.2.1 Project Coordination

The management structure aligns with the dissemination and exploitation uptake strategy of ToShare, with clear roles and responsibilities allocated to all partners. The management structure is shown below. The structure aims to ensure cost effective and gender sensitivity management whilst achieving the goals of the project within acceptable time, budget and quality standards. The management and communication links and activities are described in more detail in WP1 and WP7 and it is summarised here. The overall project management and coordination will primarily be the responsibility of the Project Coordinator and the Project Manager based at the UPV/EHU, with support from the WP leaders forming the nucleus of the Project Management Team (PMT) with the support of Oreka Sarea. The PMT will ensure an effective overall management and delivery of the project. The PMT will: i) be the decision body of ToShare; ii) Review the overall progress of the project (and policy / strategy) – including both scientific progress and implementation of the Dissemination and Exploitation Uptake Strategy (DEUS); iii) plan for exploitation of project results; coordinate the Social Europe Panel and the Data Management Plan (DMP); iv) Evaluate any potential changes and deviations and make suitable decisions for the next steps; iv) Undertake risk

analysis; v) Assess the progress of the project, commission any corrective actions if necessary and authorise appropriate amendments to the work plan according to the recommendations of the different work package leaders in order to meet the overall objectives.

The project coordinator will also have the support of staff based in a) the European Team in the University of the Basque Country who will give expert advice on the drafting of the consortium agreement and will maintain an oversight of the progress of the project as a whole, and b) the Financial Office of the University of the Basque Country, who will assist in the processing of financial claims, monitor budgetary spend and produce financial reports. The **Project Support Office (PSO)** will ensure the effective implementation of the programme of work and will report to the external Advisory Group, and the EU Commission. The PSO and PMT will ensure that communication and extension occurs through the dissemination team, and that feedback from testing and stakeholders, is provided to all partners.

Financial Coordination

The project will be managed using effective procedures and a methodology that guarantee the adequate development activities, in an efficient way (i.e PRINCE2). Managing the project includes the following (non-exhaustive) activities: (i) Implementation and maintenance of the Grant Agreement and of the preceding Consortium Agreement; (ii) Overall legal, financial, administrative management and reporting, (iii) Appropriate planning and operational management of intellectual property and risks; (iv) Handling of/facilitating the resolution of any ethics issues, and any disputes/complaints in accordance with the Consortium Agreement; (v) Implementation of competitive calls by the consortium for the participation of new beneficiaries.

Liaison with the European Commission

This will be partly fulfilled through the provision of short reports, provided to the EC every six months, outlining project progress and developments, in addition to other updates and reporting measures. This will ensure the appropriate follow-up of project obligations from the Grant Agreement (formal reporting: of science results and finances, project reviews, communication, and management). The project coordinator will maintain regular and comprehensive contact with the EC in Brussels and ensure that the appropriate EC representative is invited to the General Assembly meetings and any other relevant project meetings. If there are any major difficulties within the project that cannot be resolved using the appropriate management structure, the Coordinator will liaise with the EC to seek advice and a solution.

Facilitating internal communication

The Project Support Office (PSO) will ensure optimal internal information exchange through regular and routine communications. The project administrator will also develop and use a dedicated internal network or intranet. This will also host templates, documents and tools that the Project Office will develop with WP7 Leader, that will aid the management and reporting of the project. This task will also ensure the implementing and maintenance of mailing lists for technical contacts and administrative contacts.

3.2.2 Work Package Leadership

A total of seven work packages are specified within the ToShare project. The work package leader is ultimately responsible for delivery of the work package scope of work, and specified deliverables. Work package team members are been designed as internal clusters of expertise based on the skills that each partner can offer the project. All work package leaders are also members of the Management Team.

Partner General Assembly (PGA): The Partner General Assembly is a mechanism through which any issues regarding project implementation that requires the approval of all partners are discussed and agreed. A PGA will be held annually and require that a representative of each partner organisation attends.

Project method and activity plan (PMAP): A key challenge for managing any research project with a large and dispersed team is to ensure that the: i) Overall aims and objectives of the project are clearly defined; ii) Roles, responsibilities, and scope of work for each partner is accepted and clear; iii) Method of communicating intra-team is defined; iv) Approach to working and reporting is uniform; v) Procedures for issues and dispute resolution are accepted by all partners. The PMAP will be established by the Coordination Team in first month of the project. This document will detail working methods and procedures adopted in ToShare so that all team members can work in a consistent, efficient and effective manner from the outset.

Team communication: A set of web based tools will be used to support team communication. Half of the Management Team meetings will be performed remotely using an online web conferencing system. It is anticipated

that we will use Adobe Connect, which offers the ability to speak, note and screen share all via a single web link. Virtual meeting room space will be created at the start of the project and used each time the team or Management Team wish to communicate online.

Working and reporting: To help ensure consistency and quality in products from the project, a set of document templates will be produced so that all products, whether team working material or public material, will be recognisable as having a corporate identify of ToShare with a consistent style and format. In doing this, document control procedures such as file naming, document development histories etc. will be introduced to the team. An online system of progress reporting will also be adopted so that the PSO is able to track project progress. The system will be designed on the basis of reporting by exception – i.e. reporting when problems occur, rather than describing actions completed, which should be routine for a successful project. In this way the burden of progress reporting is minimised for all partners, but remains effective for managing overall implementation of the project.

Work package implementation plans (WIPs): Whilst the WP description tables provide a clear summary of the work proposed, they do not detail the specific actions of each partner. Work package implementation plans (WIPs) will be produced for each work package, within which an expanded description of the work programme will be developed. The description is such that any person could review and understand the steps of work that all partners involved in that work package will be undertaking.

Use of web-based tools and procedures: In ToShare the use of web-based tools and procedures which can significantly enhance the team working process, facilitating team communication, remote working and project management, will be used. These methods have been proven to work in practice giving flexibility to adapt to different teams and project structures. Web based tools will be established within the team working area of the project website. It is envisaged that these will include: i) Team contacts; ii) Document management system; iii) Meetings & Events management system; iv) Guidance and templates; v) Progress reporting; vi) EC reporting; vii) File exchange; viii) Online Material library; ix) Social media interfaces; x) Workshop / conference events support facilities; and xi) Newsletters /press. The range and scope of these will be agreed at the outset of the project. The approach taken is to adapt and use tools and methods that meet project specific needs. The value of effective networking and in particular the use of social media is recognised and forms a growing part of these support tools.

Leadership and management

The overall ToShare Lead Coordinator is Professor **Angel Elias** (UPV/EHU), supported by WP leaders and the rest of partners, with dissemination and exploitation co-ordination oversight provided by Young Foundation and gender mainstreaming by Oreka Sarea. The project coordination will have the support of the PSO, PGA and external Advisory Group that will provide strategies and technical oversight of all elements of the ToShare project, tool development and stakeholder engagement and communication programs are successful and remain on track to deliver the expected outcomes during and beyond the life of the project. Advisory Group composition is detailed in section 4 of this proposal. As defined there, 5 expert organizations (networks and policy makers) will give advice and recommendations along the different stages of the project, as part of this Advisory Group, covering the 4 main dimensions of ToShare.

The consortium consists of prestigious universities and research groups located in different European territories such as the Basque Country and Catalonia in Spain, Timisoara in Romania, Trento in Italy, Bordeaux in France, Budapest in Hungary, Edinburgh in Scotland, London and York in England, Berlin in Germany and Lugano in Switzerland. At the same time, the participation of research and consultancy companies such as Tecnalia, Prospektiker, Weroi Digital, Sl, and Oreka, as well as The Young Foundation and Dialogue of Civilization Research Institute, guarantee an strong technical complementarity, along with stakeholders engagement capacity.

A very important differentiating element in the ToShare consortium is the participation of networks involved directly as partners or as key advisors, bringing a multiplier effect to the project. Networks such as RIPESS EUROPE, partner of ToShare and a benchmark in the solidarity economy. Also with Advisors such as ETUI for trade unions, Eudec and AICE for education, and BIEN as an unquestionable expert network on basic income, which guarantee in these areas a vision and communication throughout the European territory, and beyond.

Finally, the participation of the public bodies at different levels, like the regional government of Navarre which together with the Royal Society for the Encouragement of Arts, Manufacturing and Commerce allow the consortium to be enriched with expert partners in public management. In addition, there are other governments and key institutions supporting the project such as Barcelona Activa (member of the Advisory Group), Aquitaine, the Gipuzkoa and Bizkaia Provincial Government, or the Bilbao City Council, which are committed to support this project with their active participation as a highlight (as signatory organizations of a letter to support the project).

Additionally, it is important to highlight how

Table 3.2a: List of milestones

Milestone number	Milestone name	Related work package(s)	Due date (in month)	Means of verification
M1.1	Kick Off Meeting (KOM) undertaken	WP1	M4	KOM Minutes
M1.2	Project management guidelines circulated to the consortium	WP1	M6	Guidelines available
M1.3	Data management plan finished	WP1	M6	DMP Available
M1.4	Consortium Agreement finalised and signed by all partners	WP1	M7	CA Available
M1.5.	First Annual Report submitted	WP1	M13	1st Report submitted
M1.6.	Second Annual Report submitted	WP1	M25	2nd Report submitted
M1.7	Final Report submitted	WP1	M36	Final Report submitted
M2.1	Creation of a common template for the three main reports	WP2	M1	Template available
M2.2	Index proposal for each report with content. Review to avoid duplicities and gaps	WP2	M2	Final index
M2.2	Smart, inclusive and sustainable growth desk research	WP2	M8	Report available
M2.4	Develop and sending of general survey and specific questionnaires	WP2	M10	Template and mails available
M2.5	Individual interviews	WP2	M10	Interviews minutes
M2.6	Develop of contrast report	WP2	M11	Report available
M2.7	Develop of final report	WP2	M12	Report available
M3.1	Completion of desk research	WP3	M9	Data Available
M3.2	Completion of interviews	WP3	M10	Data available
M3.3	Completion of identification, description and analysis of relevant cases (based on desk	WP3	M12	Templates, forms and information sheets available [for DB]
M3.4	Development of Database	WP3	M12	Interface delivered
M3.5	Completion of identification and assessment of main key factors for success and for	WP3	M14	Report on the identification of key factors to bridge the existing gaps in relation to each of the
M3.6	Completion of uploading available materials on website, including the Database and the	WP3, WP4	M15	Final Report
M4.1	Strategic variables selected	WP4	M16	Dictionary of strategic variables available
M4.2	Alternative scenarios developed	WP4	M20	Description of alternative scenarios

M4.3	Desirable scenario report	WP4	M22	Desirable scenario described
M5.1	1st Draft of the Strategy	WP5	M24	Draft available
M5.2	Social innovation Workshops organised	WP5	M27	Workshops held, minutes & pictures
M5.3	2nd Draft of the Strategy	WP5	M30	Draft available
M5.4	Final Strategy (after piloting)	WP5	M36	Report published on ToShare website and disseminated through various channels
M6.1	Basic Income Typology Report	WP6	M22	Report published on ToShare website and disseminated through various channels
M6.2	Basic Income Toolkit	WP6	M28	Toolkit published and available on ToShare website
M6.3	BI Toolkit tested in practice	WP5 WP6	M30	Testing in ongoing experiment sites undertaken, report published on ToShare website
M6.4	Launch of Global Knowledge Sharing Network	WP6	M30	Launch event(s) held, network goals and membership published
M6.5	Final Basic Income and other Strategic Measures Evaluation report	WP6	M32	Report published on ToShare website and disseminated through various channels
M7.1	ToShare visual identity defined and website operational	WP7	M6	ToShare website finished and available. ToShare templates finished
M7.2	ToShare co-creation framework defined	WP3, WP4, WP5, WP6 and WP7	M5	Report describing the supporting structure including processes, methodologies and timeframe
M7.3	Monitoring and evaluation of the co-creation activities and capacity building	WP3, WP4, WP5, WP6 and WP7	M45	Evaluation report from the activities (workshops with stakeholders, communities and
M7.4	Exploitation activities implemented	WP7	M48	Descriptive report on the exploitation activities developed

3.2.3 Innovation Management

It is essential to involve all actors, but particularly public bodies who will provide steers in terms of technical direction, practicability and future applicability. This will be particularly relevant across different nations, where overall goals are similar, but national or even regional and local governance may affect the suitability and feasibility of different approaches.

As such, the ToShare project has been structured to allow for timely and ongoing interaction with public and specific target audiences. Some such organisations are direct project partners, and will take direct roles in assessing, steering and guiding the research development; other organisations will take an overview role via the External Advisory Group, where their contributions will be formally sought annually, but also at key stages during the programme and during project meetings. As an initial action to ensure that the project establishes very strong links with key actors and public partners, and has a commonly shared and integrated vision, the Management Team (i.e. coordination team plus WP leaders) will establish contact early on in the project (ideally first 9 months).

3.2.4 Project risks and suggested mitigation measures

The ToShare consortium is fully committed with the project and will continually assess potential risks to ensure the efficient development of the project work plan and outcomes. Nevertheless, there may be external factors which

could influence the project and being flexible to adapt to this situation will be important. Please see **Table 3.2.b** for a comprehensive overview of the main risks of the specific work packages.

Table 3.2b: Critical risks for implementation

Description of risk (indicate level of likelihood: Low/Medium/High)	WP(s) involved	Proposed risk-mitigation measures
Team sharing a common vision	WP17	Effort is focussed at the start of the project to ensure that there is clarity and a common understanding of the overall goals, and contributions that each WP plays to meeting those goals. More detailed (than WP description tables) Work Implementation Plans (WIPs) will be produced for each work package by Month 2. Common agreement and understanding will be ensured through continuous communication among all partners.
Team Disputes	ALL WPs	Any disputes will be dealt with initially via WP leads and subsequently via the Management Team following procedures agreed within the project consortium agreement.
Working from different countries and time zones; ensuring integrated team work and communication	WP7	The consortium comprises members drawn from across different European Countries. Extensive use of online communication / working tools will be made to facilitate team working and communication, building from past experience on EU research work under FP4/5/6/7 and other H2020 horizon proojects. A dedicated online conferencing and screen sharing system will be established for the project to allow all partners easy access to each other via laptops, PCs or mobiles.
Minimising travel and subsistence costs	ALL WPs	Travel between Countries is expensive and time consuming. However, periodic face to face meetings are essential to progress work in an effective and integrated manner. As such, 6 project wide meetings have been scheduled across the project. Common calculations have been adopted for all partner T&S costs in participating in these meetings. Other actions such as WP specific meetings and meeting of the Advisory Group are also scheduled at the same time to reduce costs. The timing of these events will also be adapted wherever possible to align with other EU events.
Quality Control	ALL WPS	Procedures for reviewing and accepting WP outputs and deliverables will be agreed from the outset, and written into the Project Method and Activity Plan (PMAP) in Month 1. These procedures will be followed and progress formally reviewed at each team meeting.
Dealing with Project Risks as they Arise	WP1 / ALL WPs	A programme of coordination team reviews will be established. These will take place during Management Team meetings (when meeting face to face) and periodically (every 3 months) via web conferencing between face to face meetings. A system of online progress reporting will be implemented from the outset so that any issues, delays, risks arising as the work progresses, can be quickly identified and managed.

Management of gender dimensions in ToShare

Lead by the Project Coordinator with support from the PSO and Oreka Sarea, the project will ensure that expertise and capacities are available for effective integration of gender perspective in research approaches and contents, contributing to gender equality in all the dimensions addressed by the project. For that purpose, a gender mainstreaming guiding document will be developed at the beginning of the project and implemented thoroughly. The guiding document will propose measures and mobilise capacities and resources at two levels:

- Internal project organisation and management, to ensure an active and meaningful participation of women and men in decision-making structures and process, and project research teams at all levels and across research topics.

- Project research processes and products, to ensure research meets the differentiated needs of citizens in their diversity. This will entail mobilising adequate expertise for gender analysis and gender-responsive research processes among partners and continuous engagement and exchange with relevant gender-related stakeholders (such as women's rights organisations, feminist networks, gender focused think tanks and research groups…).

3.3 Consortium as a whole

The ToShare Consortium provides an ideal combination of the required skills, expertise, competence and experience to develop a successful project. The composition of the consortium was carefully designed, not only to give a good geographical coverage of Europe, but also to include a wide range of actors and networks in particular as a differentiating - value added element, with high relevance to the issue and proper competences to deliver what is required for the project. In fact, it represents a broad and balanced group of leading research institutions and academia, public administrations and decision-makers and networks. It thereby ensures the multidisciplinary perspective necessary to achieve the project objectives.

Moreover, the deeply embedded cooperation of all partners representing academia, NGOs, think tanks, companies, and foundations, will assure that the exploration and testing of different policy options are consistent with current local technical, legislative and management frameworks, and are relevant to the actual needs of the various case studies.

The ToShare project consortium was established in a series of bilateral and multilateral meetings over the last half year. The partners were addressed by the project coordinator (UPV/EHU) in order to cover the whole range of needed expertise for the achievement of the project‘s goals.

Geographical coverage: The key competence of each consortium member is the basis for assignment of tasks and responsibilities in order to develop and coordinate the various work packages and justify the European dimension of the project. In fact, the Consortium is composed of partners from 8 EU Member States plus Switzerland. Each partner will integrate its activities with other partners involved in the project, as the competences of the consortium represent a synergistic team, where each competence is strengthened by different approaches provided by the others.

Wide range of sectors and competences: The ambitious aim of the project requires a diverse and balanced distribution of strong expertise in the various fields as well as of role-competencies in managing such events from different perspectives (policy makers, service provider, and academic-research). In fact, the consortium members' skills are complementary and create a well-balanced set of internal expertise clusters to address different aspects of the research and to tackle any possible risk emerging during project execution. In this respect, the partners are capable of interacting not only within their field but also with partners of different fields, which is essential for complex systems research in general. Due to their prolonged experience with the last generations of European (applied) research projects and because of their institutional mission all members of ToShare Consortium are highly experienced in this kind of interdisciplinary work (see description of partners at section 4.1).

Capacity and commitment for gender mainstreaming: Project partners are guided by gender equality principles and promote and encourage women's participation and professional career development within their organisations. This will be replicated at project level ensuring that all management structures and processes and research teams promote an active and meaningful participation of women and men. Moreover, project partners bring specific experience and capacities for gender analysis and gender mainstreaming in their respective areas of work. At this level, the project will mobilise partners' capacities for effective integration of a gender perspective in research approaches, contents and products, contributing to gender equality in all the dimensions addressed by the project.

Partner meetings will take place every 6 months and the national partners hosting them will coordinate themselves in order to organize the adequate logistics to guarantee the performance of the meetings in a fruitful and cost effective manner. The following meetings have already been scheduled and agreed:

M1- Bilbao - Spain
M7 - London - UK
M14- Timisoara - Romania
M21- Bordeaux - France
M27- Edinburgh - UK
M34- Brussels - Belgium. Together with the Final Conference

3.4 Resources to be committed

ToShare is delivered over **3 years**, using a total of **406,5 person months** effort from **21 partners**, with a requested grant of €**2.997.898,75 from a total eligible cost of €2.997.898,75 (i.e. 100%).** Total direct costs amount to € 224.994 and subcontracted costs to € 32.000 which are 7,51% and 1,07% of the total eligible cost respectively. The following table shows the PM distribution within the project by work package.

Table 3.4a: Summary of staff effort

	WP1	WP2	WP3	WP4	WP5	WP6	WP7	Total Person-
UPV/EHU	**34**	8	4	8	**20**	2	5	81
TECNALIA	2	**18**	0	1	5	0	4	30
IBEI	1,5	0	0	1	3	0	2	7,5
UVT	1,5	1	14	1	1	0	4	22,5
EURICSE	1,5	3	2	1	3	0	2	12,5
IEPBX	1,5	0	0	1	3	0	2	7,5
BIPA	1,5	4	2	1	1	0	3	12,5
UPF	1,5	3	2	1	3	0	2	12,5
RIPESSEU	1,5	1	2	1	3	0	2	10,5
PKT	2	0	0	**17**	2	0	4	25
UEDIN	1,5	0	1,5	1	1	11	2	18
YF	2	5	0	4	3	2	**16**	32
WEROI	1,5	0	0	1	1	0	6	9,5
USI	1,5	1	**16**	1	1	0	4	24,5
GN	1,5	0	0	1	1	6	2	11,5
RSA	2	0	0	1	1	**19**	4	27
UB	1,5	0	0	1	4	0	2	8,5
CNRS	1,5	1	2	1,5	6,5	0	2	14,5
UYORK	1,5	0	1	1	1	1	2	7,5
DOC RI	1,5	5	4	1	1	4	3	19,5
OREKA	8,5	0,5	0,5	1	1	0,5	0,5	12,5
Total Person Months	73	50,5	51	47,5	65,5	45,5	73,5	406,5

Table 3.4b shows the "other direct cost" items for the cases where these items exceed 15% of the personnel costs, for partner. Just 4 partners are in this situation where "other direct costs" exceed 15% of personnel costs.

Table 3.4b: 'Other direct cost' items (travel, equipment, other goods and services, large research infrastructure)

1/UPVEHU	Cost (€)	Justification
Travel	**40.204 €**	**5 project meetings for 2 people: 8.740€ 2 reporting meetings in Brussels with the EC – 6 lead partners for 2 people: 10.488€ Travel cost for the Advisory group - 4 organizations x 6 trips x 1 person: 20.976€**
Equipment		
Other goods and services	**15.000 €**	**Organization of 6 project meetings - (room hire, catering…) 2000€ x 6 meetings: 12.000€ Audit: 3.000€**
Total	**55.204 €**	

3/ IBEI	Cost (€)	Justification
Travel	**5.244 €**	**6 project meetings for 1 person**
Equipment		
Other goods and services		
Total	**5.244 €**	

12/YF	Cost (€)	Justification
Travel	**8.740 €**	**6 project meetings x 2 people**
Equipment		
Other goods and services	**28.000€**	**Costs related to the organization of project workshops in different regions (room hire, tea/coffee…), along with the Final Conference.**
Total	**36.740€**	

13/WEROI	Cost (€)	Justification
Travel	**4.370 €**	**5 project meetings x 1 person**
Equipment		
Other goods and services	**15.000**	**Organization of dissemination events**
Total	**19.370 €**	