



Ministry of Foreign Affairs of Denmark
Portuguese study on the Recovery and Resilience Plan

Final Report

March 2020



**MAKING AN
IMPACT THAT
MATTERS**
since 1845

Executive Summary (1/2)

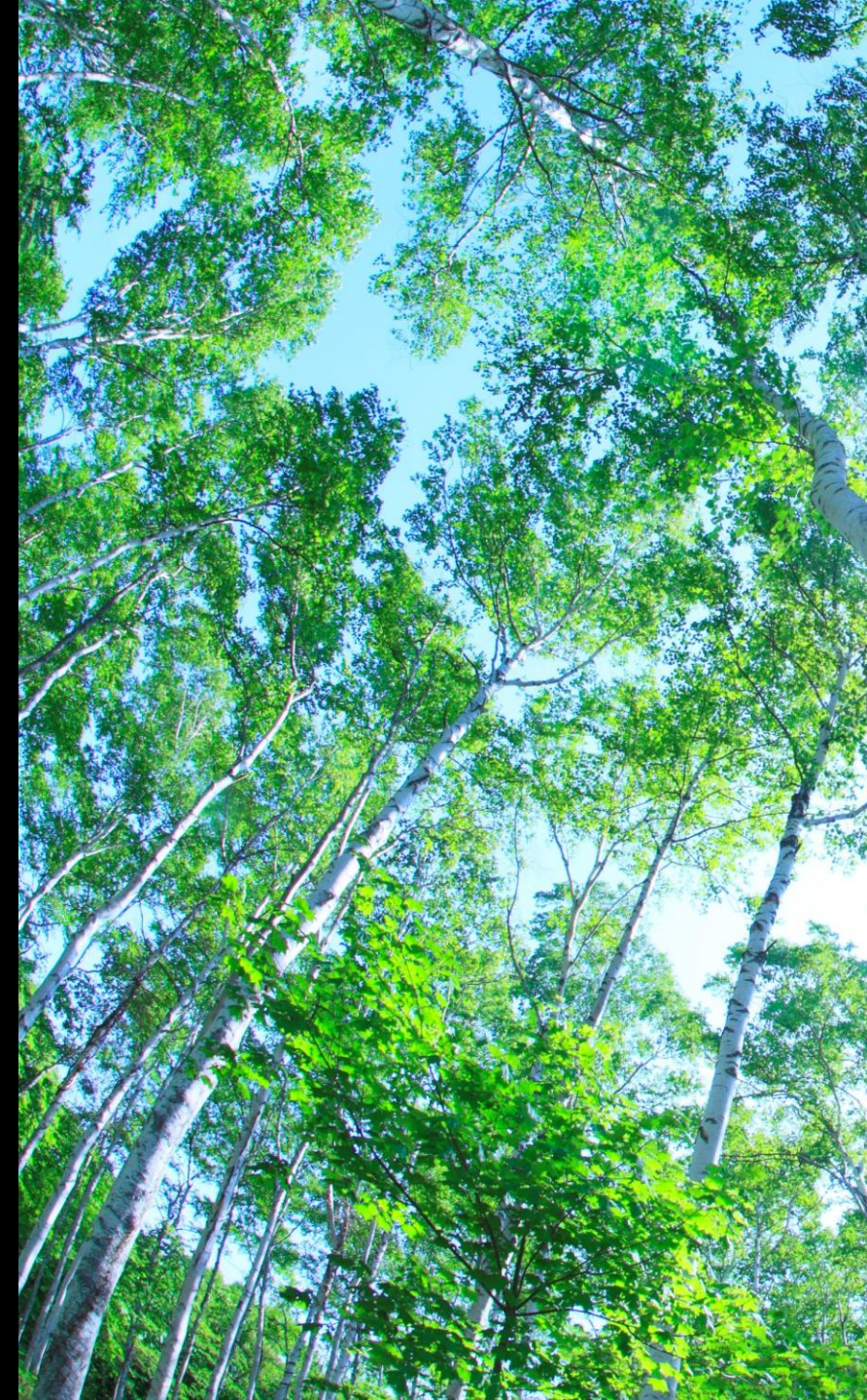
The current coronavirus pandemic situation have been causing a profound negative impact on the different European Union (EU) Member States, creating additional challenges in achieving the EU convergence goals, thus increasing the inequalities between countries and their communities.

To help repair the economic and social damage caused by the pandemic, both the European Commission and the European Parliament and as well as the EU27 leaders have agreed on the definition of a strong recovery plan, aiming to lead the way out of the crisis and lay the foundations for a modern and more sustainable Europe. At the European Council of 21th July 2020, the Member States agreed simultaneously on the Multiannual Financial Framework for the period of 2021-2027 and also on an innovative European recovery instrument, know as Next Generation European Union (Next Generation EU). This instrument will mobilize a amount of Euro 750 billion, through the issuance of debt, and aims to (i) help repair the immediate crisis brought about by the coronavirus pandemic, and (ii) prepare a post-Covid-19 society, with a greener, more digital and more resilient Europe, to better address the current and forthcoming challenges.

In Portugal, the Recovery and Resilience Plan (RRP) was designed taking into account the “Strategic Vision for Portugal 2020-2030 economic recovery plan”, a document requested by Portuguese State that intends to define the priority investment areas where Next Generation EU funding must be applied. The country will have access to a total amount of Euro 30,7 billion, with nearly 54% in the form of grants. The Portuguese RRP has a particular focus in 3 (three) pillars, namely: Resilience, Climate Transition and Digital Transition.

These 3 (three) dimensions develop into 9 (nine) scripts in order to foster economic recovery, inclusive growth and green and digital transitions.

Portugal aims to effectively address the arising opportunities from this strong European expansionary economic policy, having been the first EU country to submit its RRP draft proposal to the European Commission.



Executive Summary (2/2)

Bearing in mind the previously mentioned context, this report has its goal the **identification of potential procurement opportunities within digital transition investments in the health and public administration sectors**, thus mapping the Portuguese public procurement framework, in order to help Danish companies effectively address the emerging opportunities within the Portuguese RRP.

In order to achieve this goal, the document follows a four chapter structure, as follows:

1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

This chapter presents the context, objectives and details on the Portuguese RRP, as well as its dimensions, scripts and components. Moreover, a detailed analysis regarding the main anticipated reforms on Public Administration and Health domains is presented, highlighting the main gaps and major investment opportunities, within digital transition.

2. Competition and assessment analysis

This chapter intends to identify the most relevant players in Portugal regarding digital transition in Public Administration and Health. This chapter also presents (i) a deep dive on the profile of these players, (ii) a technological segmentation and, (iii) an assessment regarding their main potentialities and gaps.

3. Opportunities for Danish companies

This chapter details investment prospects for each funding opportunity and identifies potential relevant players. The result of this analysis is an opportunity matrix, designed to guide Danish companies in terms of expected action areas for each investment opportunity, fostering, at the same time, access to potential partnerships for specific opportunity domains.

4. Public procurement framework and legal tendering

The last chapter summarizes the Portuguese public procurement framework regarding the RRP, as well as relevant (i) tender procedures, and (ii) project award timeframes.



*“The recovery plan turns the immense challenge we face into an opportunity, not only by supporting the recovery but also by investing in our future: **the European Green Deal and digitalization will boost jobs and growth, the resilience of our societies and the health of our environment. This is Europe's moment.** Our willingness to act must live up to the challenges we are all facing. **With Next Generation EU we are providing an ambitious answer.**”*

Ursula von der Leyen, President of the European Commission

European Commission Press Release, 27th May 2020

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1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)



1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

Introductory notes ^(1/2)



EU Guidelines for Recovery

In order to deal with the severity and profound negative effects of the pandemic crisis on the different Member States, European Union has defined an ambitious collective solution that seeks to help a post-Covid-19 recovery.

A total of Euro 1.824 billion was mobilized to boost the achievement of this complex goal, focused in transforming Europe into a **greener, more digital and more resilient society**. This strategy will be executed simultaneously through the (i) **Multiannual Financial Framework (MFF)** for the period of 2021-2027 (Euro 1.074 billion) and (ii) **Next Generation EU (NG EU)** between 2021-2026 (Euro 750 billion).

This agreement will reinforce and support modernization in the following areas:



Single market,
innovation and
digital



Cohesion,
resilience and
values



Natural resources and
environment



Migration and
border
management



Security and
defense



Neighborhood and
the world



European public
administration

	Single market, innovation and digital	Cohesion, resilience and values	Natural resources and environment	Migration and border management	Security and defense	Neighborhood and the world	European public administration
MFF	€132,8 B	€377,8 B	€356,4 B	€22,7 B	€13,2 B	€98,4 B	€73,1 B
NG EU	€10,6 B	€721,9 B	€17,5 B				



1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

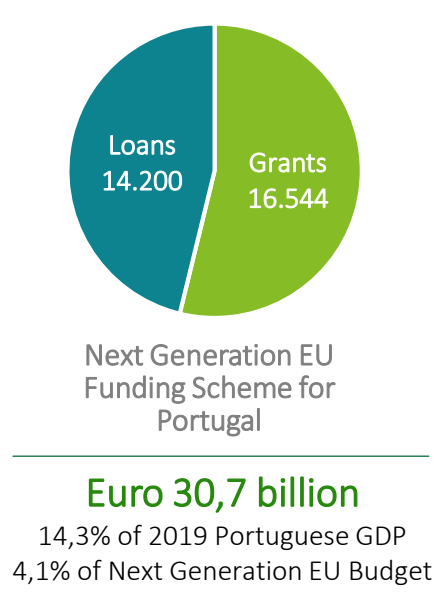
Introductory notes (2/2)



Next Generation EU

This framework represents an Euro 750 billion temporary recovery instrument that will allow European Commission to raise funds, extraordinarily, through the issuance of European debt. Directed for **3 (three) specific areas** – (i) Single market, innovation and digital, (ii) Cohesion, resilience and values and (iii) Natural resources and environment – under **7 (seven) different instruments**, the major is the **Recovery and Resiliency Plan (RRP)**, with a Euro 672,5 billion budget, which aims to mitigate the economic and social impact of the coronavirus pandemic and make European economies and societies more sustainable, resilient and better prepared for the challenges and opportunities of the green and digital transitions.

Next Generation EU Funding Scheme (million Euro) – Period 2021-2027			
			%
Recovery and Resilience Facility	672.500	28.144	4,2%
Loans	360.000	14.200	4%
Grants	312.500	13.944	4,5%
<i>REACT-EU</i>	47.500	2.000	4,2%
<i>Just Transition Fund</i>	10.000	500	2,9%
Rural Development	7.500		
<i>InvestEU</i>	5.600		
Horizon Europe	5.000	155	1,2%
<i>RescEU</i>	1.900		
Total	750.000⁽¹⁾	30.799⁽²⁾	4,1%



Recovery and Resilience Facility

The Portuguese Recovery and Resilience Plan (RRP) is guided by national strategies and policies, as part of the **European response framework to the severity of the pandemic crisis**, and in line with the European priorities regarding climate and digital transitions

Sources: (1) Conclusions from July 2020 European Council (values in current prices).
(2) Recovery and Resilience Plan (As of February 15th 2021).

1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

Context and objectives of RRP



Context

The Portuguese Recovery and Resilience Plan (RRP) benefits from the “Strategic Vision for Portugal 2020-2030 economic recovery plan” developed by Professor António Costa Silva at the request of the Portuguese Government, which was subject of a wide national debate, including through a public consultation process with more than 1.600 contributions. It is an integral part of a coherent Plan to recover the country from the pandemic situation, and lay the foundations for an economy of the future.

Challenges

Portugal is facing a wide range of challenges, namely the **demographic**, **digitalization** and **climate change**. In addition to these challenges, it is important to maintain efforts to continuing combat old structural problems, such as the Portuguese people **qualifications**, the existence of **multiple inequalities** and the territory **unbalanced development**.



Objectives

The **objective of the RRP**, available under the Next Generation EU, **is to support the implementation of investments and reforms that empower Member States' economies, making them more resilient and better prepared for the future**. The Portuguese RRP is focused in **3 (three) main pillars**:

The strengthening of the country's economic, social and territorial resilience to assure a fast recovery in the short-term and to reinforce economy and society capabilities to respond to future shocks.

The promotion of climate transition and the fostering of the economic and society decarbonization, in order to achieve the climate neutrality by 2050.

The digitalization of the economy, society and public administration, contributing to the preparation of productive structures that enhance country competitiveness.

Resilience

Climate Transition







Digital Transition

1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

RRP dimensions, scripts and components (1/2)

Portuguese Strategic Overview

The consolidated results of the strategic analysis in the document “Strategic Vision for Portugal 2020-2030 economic recovery plan” were incorporated into the national strategy, structuring the PRR in **3 (three) dimensions** – Resilience, Climate Transition and Digital Transition – which in turn develop in **9 (nine) scripts** for the resumption of sustainable and inclusive growth, as presented as follow.

Dimension	Script			Investment*
Resilience	Social Vulnerabilities	Productive Potential and Employment	Competitiveness and Territorial Cohesion	 61%  8,5 B€
	€3.849 M	€2.755 M	€1.939 M	
Climate Transition	Sustainable Mobility	Decarbonization and Bioeconomy	Energy efficiency and renewables	 21%  2,9 B€
	€1.032 M	€865 M	€991 M	
Digital Transition	Digital School	Enterprises 4.0	Digital Public Administration	 18%  2,5 B€
	€559 M	€650 M	€1.304 M	



* Only considered the grants amount defined for each script.



Weight in total investment



Total dimension investment

1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

RRP dimensions, scripts and components (2/2)

Script		Component			
01	Social Vulnerabilities	National Health System	Housing	Social Responses	Elimination of Poverty Grants (Metropolitan Areas)
02	Productive Potential and Employment	Investment and Innovation		Qualifications and Skills	
03	Competitiveness and Territorial Cohesion	Infrastructure	Forests	Water Management	
04	Sustainable Mobility	Sustainable Mobility			
05	Decarbonization and Bioeconomy	Industry Decarbonization			Bioeconomy
06	Energy efficiency and renewables	Energy Efficiency and Renewables		Hydrogen and Renewables	
07	Digital School	Digital School			
08	Enterprises 4.0	Digital Transition (Enterprises)			
09	Digital Public Administration	Digital Public Administration			

1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

Strategic Portuguese Plan for Digitalization ^(1/2)

Resilience

The Resilience dimension is composed by **Social Vulnerabilities**, Productive Potential and Employment and Competitiveness and Territorial Employment, representing 61% of the total investment projected on the plan. The reforms related to **National Health System** are included in the script Social Vulnerabilities, aggregating a total of **5 (five) different reforms**. The table below presents the different funding items by specific component:

		Resilience (R)				€ 8.543 M		
		Social Vulnerabilities		Productive Potential and Employment		Competitiveness and Territorial Cohesion		
		€ 45% R	🕒 28% RRP	€ 32% R	🕒 21% RRP	€ 23% R	🕒 14% RRP	
Component	National Health Service (SNS)	€1.383 M		Investment and Innovation	€1.396 M		Infrastructure	€ 833 M€
	Primary Health Care	463		Mobilizing Agendas and Reindustrialization	930		Business Reception Areas	110
	Network National Integrated Care and Palliative Care	205		Mission Interface - Renewal of the C&T support network and guidance for productive fabric	186		Missing Links and network capacity increase	363
	Mental health reform	85		Research and Innovation Agenda for the sustainability of agriculture, food and agroindustry	93		Cross-border links	110
	Equipment for Hospitals Seixal, Sintra and Lisbon	196		Development of the "Cluster of the Azores Sea"	32		Business Reception Areas – Road Accessibility	190
	Strengthening the Regional Health Service in Madeira	89		Recapitalize Azores Business System	125		Logistics Circuits - Regional Road Network of the Azores	60
	Digital Transition in Health	300		Economic Recovery of Azorean Agriculture	30		Forests	€ 665 M€
	Digitalization in Health - Madeira	15		Qualifications and Skills	€1.359 M		Landscape Transformation of Vulnerable Forest Territories	270
	Digital Hospital in Azores	30		Modernization of Professional Education	710		Fuel Management Ranges - Primary Network	167
	Housing	€1.633 M		Decent work promotion agenda	230		Rural firefighting means	92
	Restructuring the social housing park	1.251		National Adult Literacy Plan	110		Territory register	96
	National Urgent and Temporary Housing Grant	186		STEAM Youth Impulse	140		MORE Forest Program	40
	Strengthening the supply of housing supported by Ram	136		Impulse Adults	140		Water Management	€ 441 M€
	Increasing Azores housing conditions	60		Adult qualification and lifelong learning - Azores	29		Algarve water efficiency plan	200
	Social Responses	€583 M					Hydraulic use of multiple ends in Crato	171
	New Generation of Equipment and Responses to Aging and Childhood Accessibility 360º	417					Increased water storage in a Multi-Purpose logic	70
	+Access Platform	45						
	Strengthening Social Responses in AU	3						
	Implement Regional Strategy to Combat Poverty and Social Exclusion - Support Networks	83						
	Elimination of Poverty Scholarships (Metrop. Areas)	€250 M						
Operations in Disadvantaged Communities in Metropolitan Areas	250							







6 investments | € 1.089 M 

1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

Strategic Portuguese Plan for Digitalization (2/2)

Digital Transition

The Digital Transition dimension, particularly relevant in the context of this prospection, is composed by 3 (three) main components: Digital School, Enterprises 4.0 and **Public Administration** blocks nearly 18% of the total investment projected on the plan. This last component, particularly relevant for this specific analysis, includes **10 (ten) particular reforms**, disaggregated in the following funding items:

Digital Transition (DT)						€ 2.513 M
Digital School		Enterprises 4.0		Digital Public Administration		
 22% DT	 4% RRP	 26% DT	 5% RRP	 52% DT	 9% RRP	
Digital School	€559 M	Digital Transition (Enterprises)	€650 M	Digital Public Administration	€ 1.304 M	
Digital Transition in Education	500	Digital Transition (Enterprises)	400	Digital Portal of Public Services and multichannel services	198	
Digital Education Acceleration (Madeira)	21	Digital Training (Enterprises)	150	Sustainable electronic services based on interoperability and data utilization to increase transparency and efficiency	102	
Digital Education (Azores)	38	Digital Transition Catalyzing (Enterprises)	100	Cybersecurity	47	
				Emergency Networks: SIRESP and 112	83	
				National Program of Training and qualification of the Public Administration	98	
				Modernization and simplification of public financial and asset management	206	
				Digital Transition in Justice and Business Environment	267	
				Digital Transition in Social Security	200	
				Digital Transition in The Public Administration of Madeira	78	
				Modernization and Digitalization in The Public Administration of Azores	25	

Component

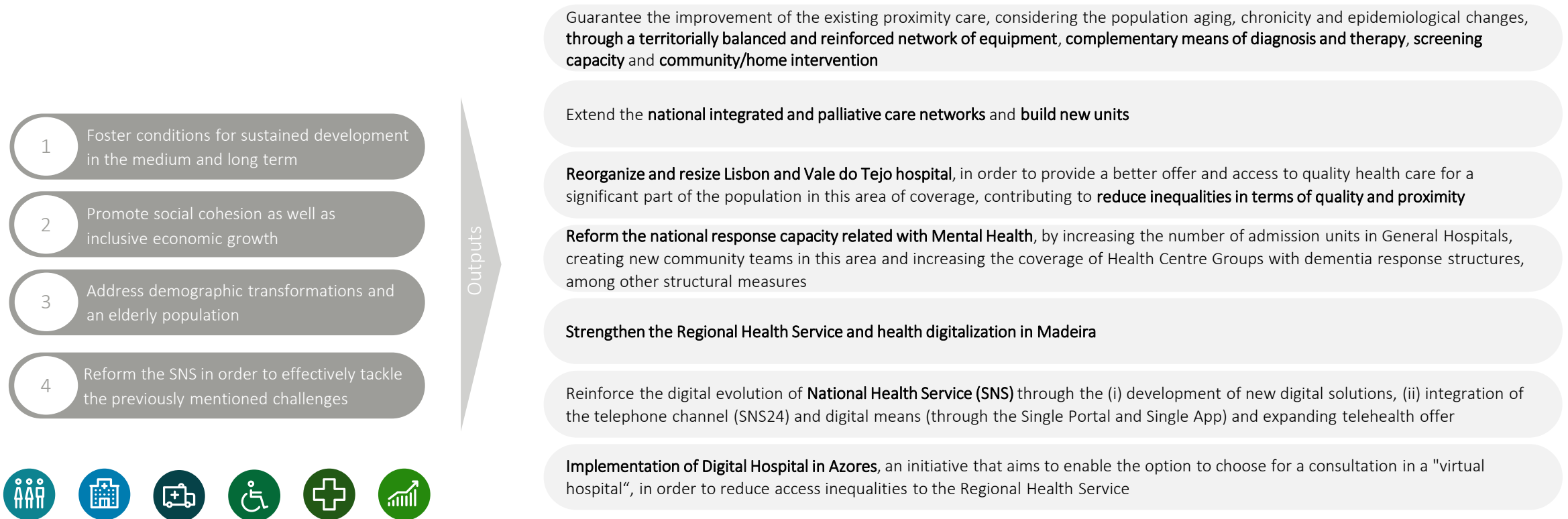
7 investments | € 968 M 

1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

Detailed analysis on digital transition by sector ^(1/2)

Social Vulnerabilities Policy Area – National Health System

The promotion of health is a decisive element in creating conditions for sustained development in the medium and long term and a determining factor in social cohesion as well as inclusive and intelligent economic growth. Portugal, like other European countries, has been facing demographic transformations characterized by increased longevity and an elderly population, which together with other factors have been challenging the National Health Service (SNS). The main challenges and the expected outputs are presented below.



1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

Detailed analysis on digital transition by sector (2/2)

Digital Public Administration Policy Area

The Covid-19 pandemic has particularly highlighted the role of Public Administration (PA) in addressing the global and complex challenges of our time and the need for processes supported in robust digital public services. In this phase of recovery from the crisis it is necessary to deepen this dimension, but also to improve ways for the PA to respond effectively to a new context, more resilient and digital, and focused on the relationship with the Citizen. By enforcing the use of technology and the development of human capabilities of the PA workforce, this component aims to:

- 1 Improve the quality and response of public services
- 2 Digitalize and integrate public services
- 3 Increase efficiency and transparency, by producing, reusing and making available data and information
- 4 Train public workers for new challenges, particularly regarding the digital transition

Outputs

Develop a **single digital portal for public services that integrates the various areas of PA**, minimizing the interactions of users and reducing context costs

Promote an extensive **technological modernization, simplification and updating of the services offering** in **Justice, Social Security, Foreign Affairs** and **Finance** areas

Increase the availability and robustness security of the **emergency communications networks** in order to guarantee the necessary response in emergency situations, particularly in these fields: **Internal Security Network, Security** and **Emergency Communications Network** (112) operational centers and technological systems

Enhance digital systems security by promoting training in cyber security and in the secure use of data, information, and knowledge in a structured and integrated manner

Implementation of a **taxation system for rustic buildings in the patrimonial information system**, adjusted to their real potentialities and to the environmental externalities of their occupation, in order to promote an environmentally sustainable use of rustic buildings

Support the **digital transition of the Public Administrations of the Autonomous Regions of Madeira and Azores**, furthering service levels provided to the citizens



1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

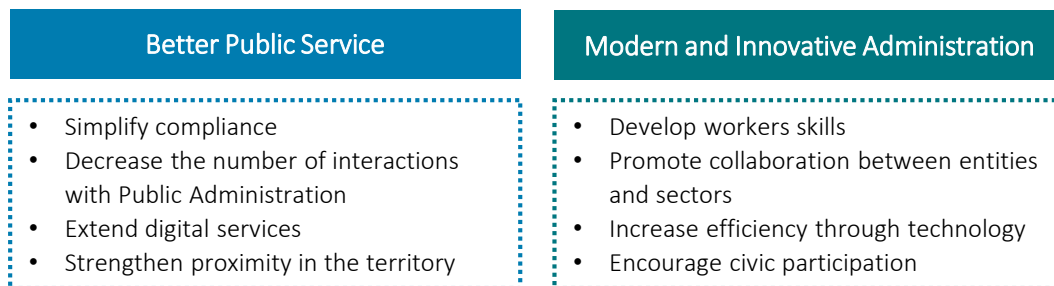
Key digital transformation programs already ongoing

Simplex 20-21 and Portugal Digital

Currently, there are a few digital transformation programs undergoing in Portugal. We highlight next two of the most relevant and recognized programs, presenting their main goals and expected outcomes. It will be included other digital programs and initiatives in the final version of this document.

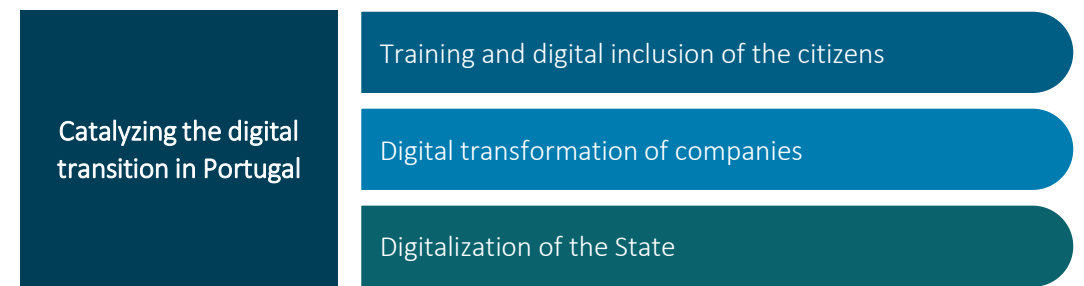


SIMPLEX is an emblematic program of the administrative modernization policy in Portugal, launched in 2006 as a transversal strategy to the Government and public administration services. Since then, several simplification measures were implemented such as the new citizen card, the possibility to create a company on the spot or simplified business information. In 2016, SIMPLEX returned as a single national program with measures that have the central objective of simplifying citizens and companies interaction with public services, contributing to a more competitive economy and a more inclusive society. The SIMPLEX 20-21, currently in force, has 2 blocks and 8 categories, as presented below:



Portugal Digital is an action plan designed to be the transformation engine of the country, through the digital empowerment of people, the digital transformation of companies and the digitalization of the State. Its purpose is to accelerate Portugal, without leaving anyone behind, and to project the country in the world.

The plan is structured in three main pillars of action and an additional dimension that creates the basic conditions for an accelerated digitalization of the country:



1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

Overview of hardware, software and training needs per sector ^(1/2)

Needs per sector within RRP – Resilience pillar

Regarding the opportunities within the Health sector (within Social Vulnerabilities script), a total of **6 key investment clusters** (amounting to **Euro 1.089M**) were pin pointed.

Resilience	Relevant investments identified*	Primary Health Care EUR 463 M (24 investments) <ul style="list-style-type: none"> • Integrated information system that allows users to be referenced between levels of care (SIGA SNS) • Build new health units/centers, to replace unsuitable buildings • Install dentistry offices in health centers • Provide health centers with technical conditions to carry out teleconsultations and telemonitoring of chronic diseases • Create integrated diagnostic centers (MCDT of low complexity, at least RX and Clinical Analysis) in Health Center Groupings 	Digital Transition in Health EUR 300 M (4 investments) <ul style="list-style-type: none"> • Data network, improving the quality of service and the resilience of SNS computer systems, assuring greater security and auditability in terms of health data, technology and maintenance • Standardization and digitalization of the communication channels between citizens and health units • Modernization of current work processes, assuring usability and mobility to health professionals • Normalization of critical data regarding the national registries in Portuguese Health System 	Equipment for Hospitals - Seixal, Sintra and Lisbon EUR 196 M (1 investment) <ul style="list-style-type: none"> • Equipment acquisition for Hospital de Lisboa Oriental and for nearby hospitals (Seixal and Sintra)
		Mental health reform EUR 85 M (9 investments) <ul style="list-style-type: none"> • Build 4 intern units in general hospitals, eliminating acute admissions in Psychiatric Hospitals • Build a new forensic unit (Sobral Cid) and remodel two others (Centro Hospitalar Psiquiátrico de Lisboa and Hospital de Magalhães Lemos - Porto) 	Digital Transition in Health - Madeira EUR 15 M (6 investments) <ul style="list-style-type: none"> • Implement digital technologies to support patient monitoring • Intensify telehealth • Strengthen ICT and artificial intelligence for epidemiological surveillance • Digitalization of health and the interoperability of the information system • Train citizens and stakeholders to use the digital health resources 	Digital Hospital in Azores EUR 30 M (3 investments) <ul style="list-style-type: none"> • Digitalization of the Health Sector in Azores • Electronic health record for each citizen • Share the clinical information between all levels of care with health professional, enhancing information not only for healing but also for prevention

*Non-exhaustive.

1. Government and health sector digital opportunities within Recovery and Resilience Plan (RRP)

Overview of hardware, software and training needs per sector (2/2)

Needs per sector within RRP – Digital Transition pillar

Regarding the opportunities within **Public Administration** (within Digital Public Administration script), a total of **6 key investments clusters** (amounting to **Euro 968M**) were pin pointed.

Digital Transition	Relevant investments identified*	Digital Transition in Justice and Business Environment EUR 267 M (6 investments) <ul style="list-style-type: none"> • Digital Courts Platforms • Development and implementation of procedural processing systems in all courts and instances (400 Courts and 3.000 magistrates) • Digital Platforms for Citizens and Business Life Cycles and for Criminal and Forensic Investigation • Strengthening of Infrastructures, Equipment and Technological Architectures: communication networks, hw/sw, datacenter, service desk, contact center • Knowledge management platforms: (i) Platform of Common Services of Justice, and (ii) Transparency Platform - Data extraction and processing 	Sustainable electronic services based on interoperability and data utilization EUR 102 M (3 investments) <ul style="list-style-type: none"> • Increase governance and the ability to securely reuse data in PA • Strengthen “Dados.Gov” service as an open data portal for PA, providing: (i) more offers, (ii) more connected data, in real time, and (iii) a better transparency communication • Promote the creation of integrated infrastructures for specific purposes, such as an integrated information infrastructure of territorial knowledge of the country, as well as the characterization of families, commercial, industrial and agricultural activities, presenting interoperability with other information systems 	National Program for Training and qualification of the Public Administration EUR 98 M (5 investments) <ul style="list-style-type: none"> • Zero Infoexclusion, directed to public workers in a situation of infoexclusion • PA Digital 4.0, based on three axes, in close articulation with higher education institutions: <ul style="list-style-type: none"> ▪ Training in productivity tools, ▪ Training for technicians in the IT career, and ▪ Training in emerging technologies and management, directed to managers and employees of the PA • Development of a multi-annual Action Plan to implement the objectives of the Qualifica AP Program
		Digital Portal of Public Services and multichannel services EUR 198 M (3 investments) <ul style="list-style-type: none"> • Provide a Unique Digital Services Portal, as “Loja do Cidadão Virtual”, that allows citizens to deal in a digital and dematerialized way with the main services of Public Administration (PA) • Contact Center equipped with technology that allows to deal with the main public services through this channel • Expand the network of Citizen Stores, Citizen Spaces and Mobile Citizen Spaces 	Digital Transition in Social Security EUR 200 M (5 investments) <ul style="list-style-type: none"> • Reorganization and modernization of the Social Security Information system • Implementation of a new technological relationship model (360º Vision) that streamlines, in an omnichannel view, the various channels of interaction • Implement infrastructure solutions, based on cloud, for Social Security systems, assuring greater performance, availability and updating 	Digital Transition in The Public Administration of Madeira and Azores EUR 103 M (2 investments) <ul style="list-style-type: none"> • Provide Madeira with high-capacity digital broadband networks in order to support: (i) the digitalization of services and companies, (ii) the knowledge society and entrepreneurship, (iii) the establishment of new Telecom trends, such as 5G networks, IoT ecosystems and the development of smart cities • Digital infrastructure in Azores Public Administration - Mobile.GOV, hosted on the AzoresCloud platform

*Non-exhaustive.

2. Competition and assessment analysis

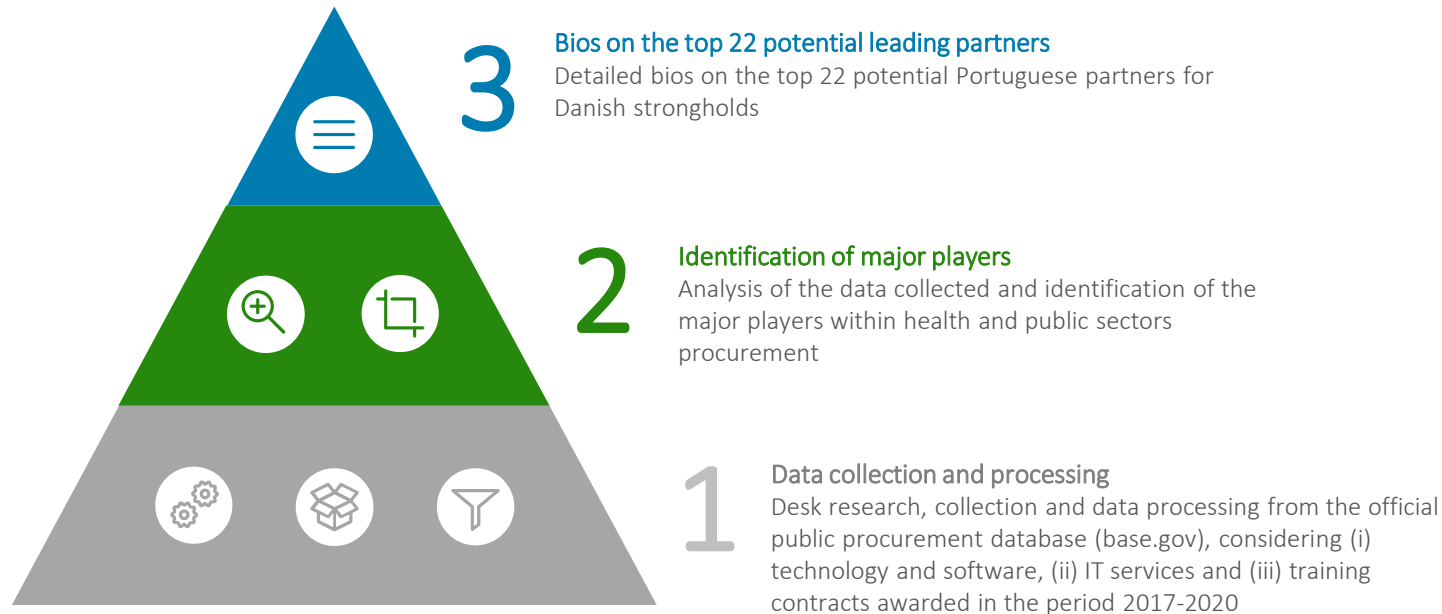


2. Competition and assessment analysis

Methodology (1/2)

The present study was developed based on a methodology that enables the identification of the most relevant players in Portugal, regarding the Public and Health Sector domains. Taking into account the Portuguese State's size and weight, particularly in the Health sector, the identified players are pivotal for an aggregated approach to the opportunities within the Portuguese RRP, where Danish strongholds can play a major partnership role.

The methodology builds upon a three-fold approach:



Assess the current main Portuguese companies on digital transition

Match these companies with the existent RRP opportunities

Seek and foster partnerships with Danish strongholds

2. Competition and assessment analysis

Methodology (2/2)

The following criteria were taken into account:

- Database used: www.base.gov.pt;
- Contract dates: 1st January 2017 to 31th December 2020 (data as of 9th March 2021);
- All contracts within the following categories: 48 - Software packages and information systems; 72 - IT services: consulting, software development, Internet and support; 80 - Education and training services;
- Companies selection: the main suppliers of the Portuguese State in 2020 were identified within three specific categories;
- Financial information extracted from D&B Hoovers for the Portuguese legal entities. Discrepancies with real business data may exist, as non-public firms do not disclose their results. In order to assure uniformity, this source was used across all companies;
- There are some startups in Portugal, particularly in the health sector, that may play a relevant role. However, it was preferred to consider only the “champions” as they are the best fit and will most likely lead and coordinate potential consortiums in regard of RRP opportunities.



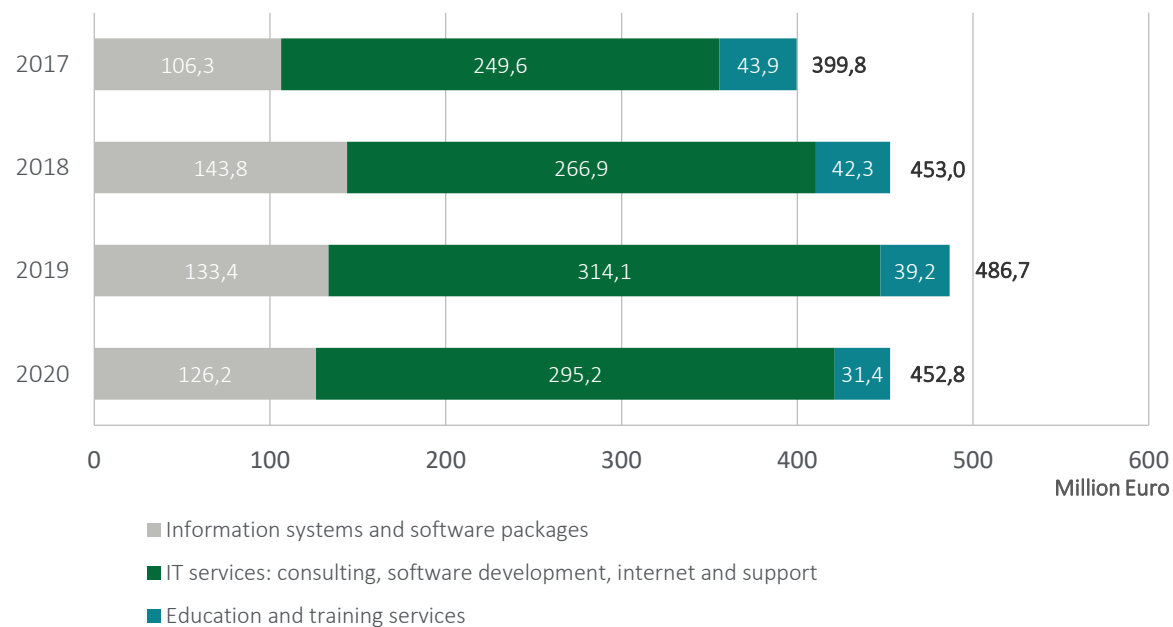
2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (1/15)

Relevant growth of purchases in information systems services by public entities

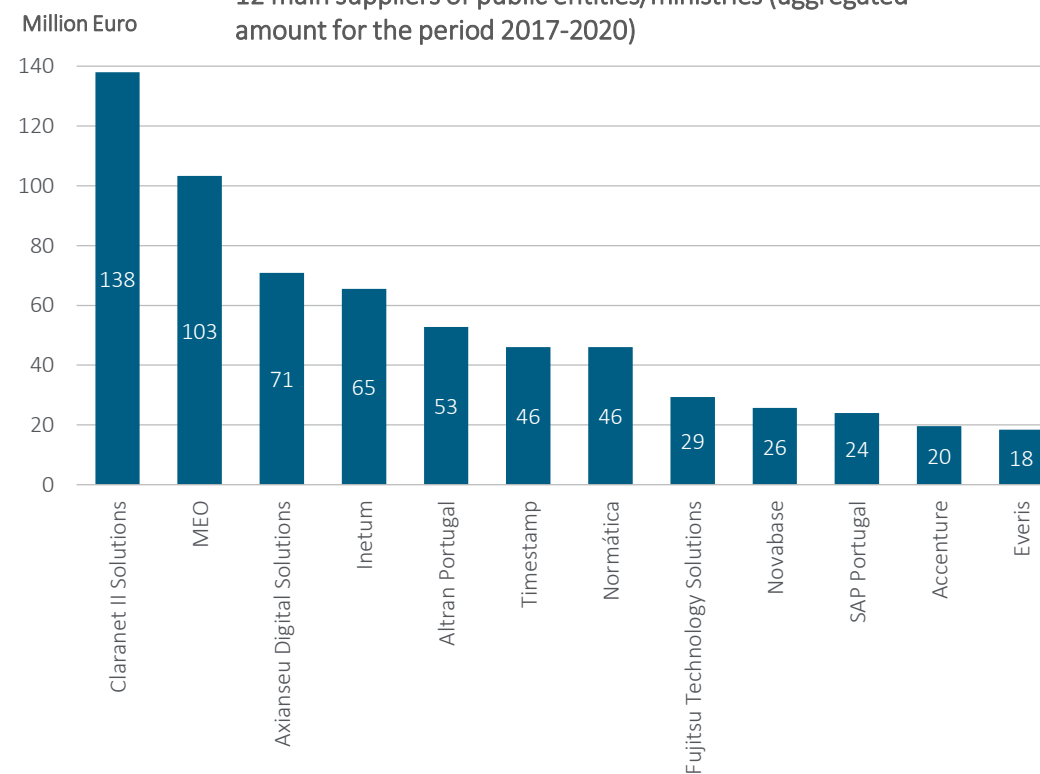
Analyzing public acquisition during the period 2017-2020 for three specific areas, namely (i) information systems and software packages, (ii) IT services and (iii) education and training, it is possible to notice an increase of 21,7% in purchases, with IT services being the most sought area of expertise, representing almost two thirds of total acquisitions for these particular fields. In 2020, despite the Covid-19 outbreak, a total of Euro 452,8 million in acquisitions was procured, a similar level to that observed in 2018. For the aggregated period of 2017-2020, some particular companies have assumed a relevant role in the digital transformation strategy defined for Public Administration/Sector, as presented below.

Evolution of awarded contracts by public entities in relevant fields (2017-2020)



Source: base.gov.pt

12 main suppliers of public entities/ministries (aggregated amount for the period 2017-2020)



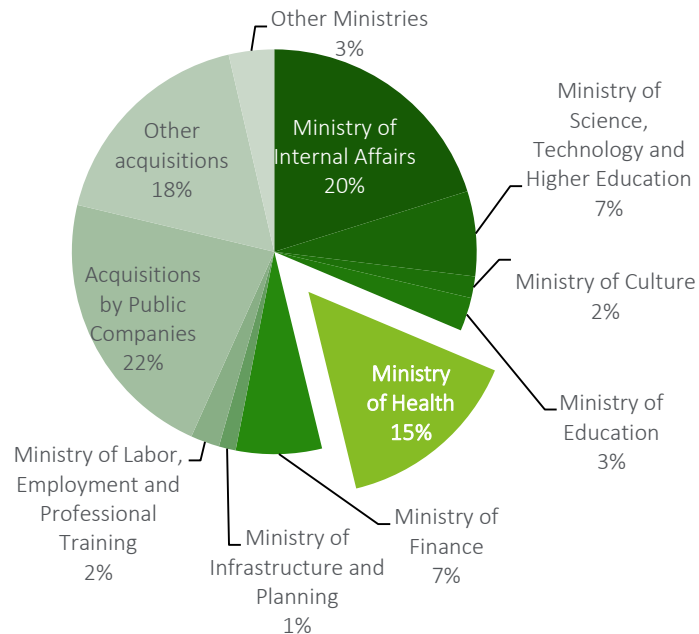
2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (2/15)

A deep dive in the evolution of the awarded contracts by the Ministry of Health

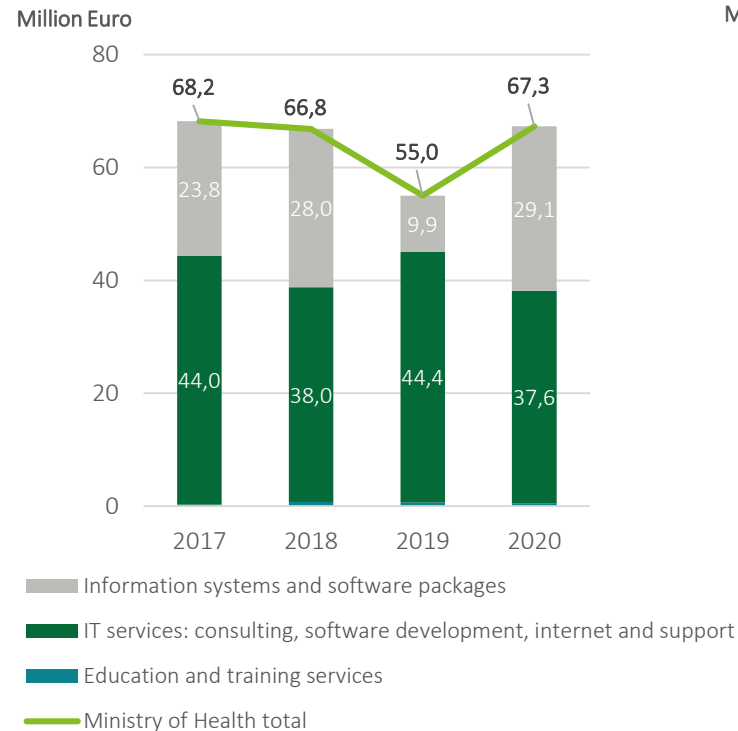
From the total amount of Euro 452,6 million contracts awarded by public entities/ministries in 2020, for the three specific areas of analysis, 15% were sought by the Ministry of Health, which outlines the important investment currently being made in the digital transition of this particular office. The Ministry of Health presents a constant value of awarded contracts during the period 2017-2020 of Euro 64 million (in average), an amount that is expected to grow due the Health policies defined in RRP. In this and the following slides are shown and presented, in more detail, the main companies that perform a major role in Public Administration and Health Digitalization. Since there are a set of players that perform effectively in both areas, relevant synergies may arise, increasing the possibilities of better address the emerging opportunities.

Weight of the different public entities/ministries in awarded contracts (2020)

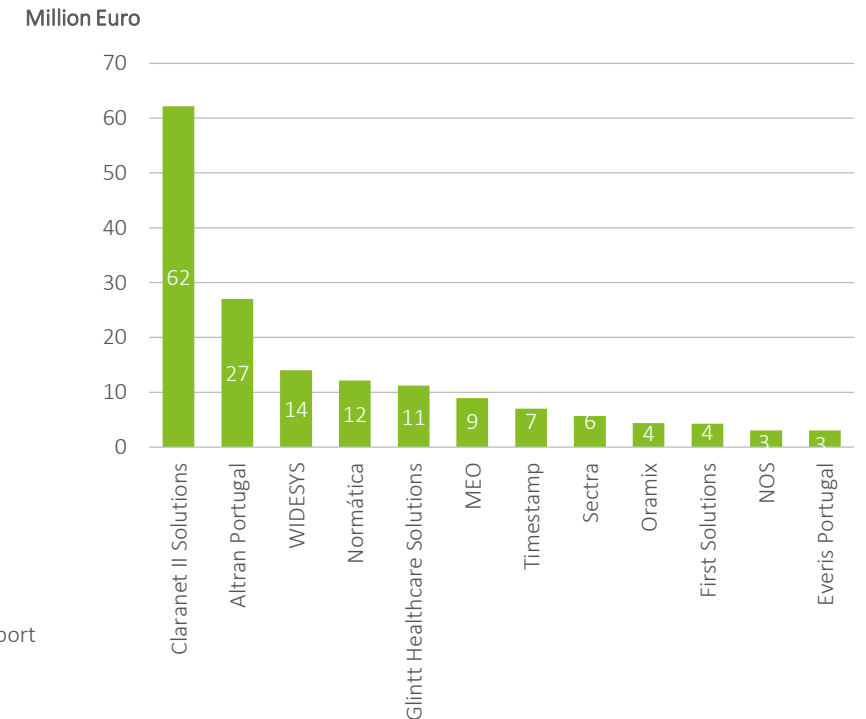


Source: base.gov.pt

Evolution of contracts awarded by the Ministry of Health for the three specific areas of analysis (aggregated amount for the period 2017-2020)



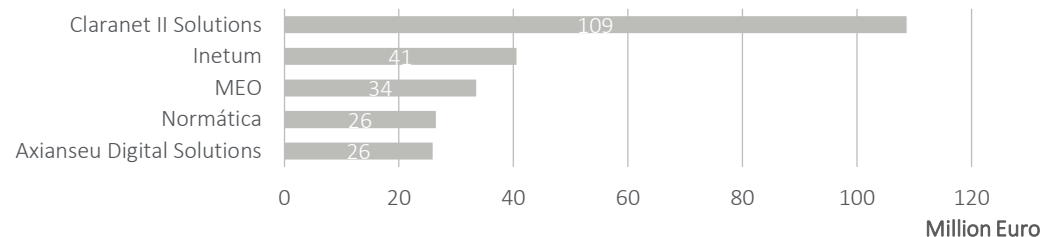
12 main suppliers of the Ministry of Health (aggregated amount for the period 2017-2020)



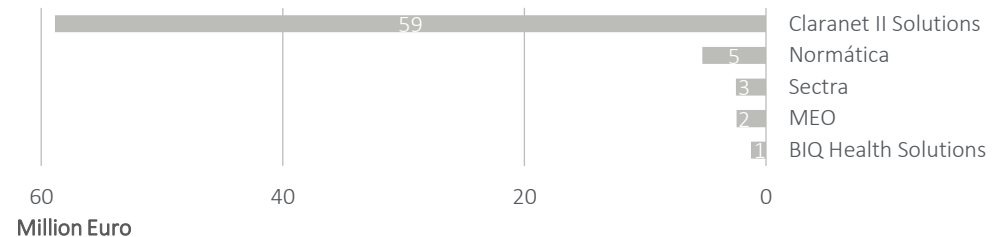
2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (3/15)

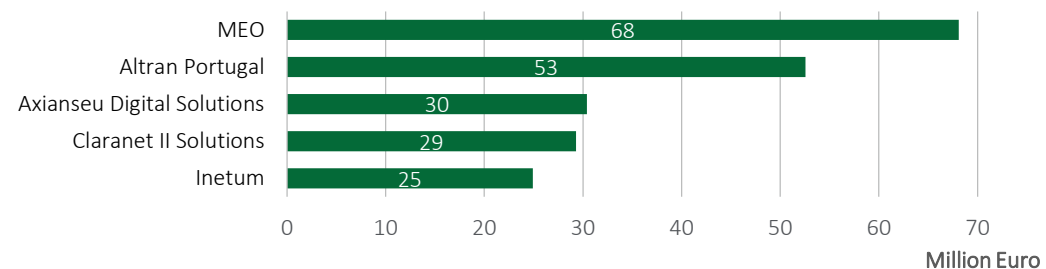
Five main suppliers of information systems and software packages for public entities (2017-2020)



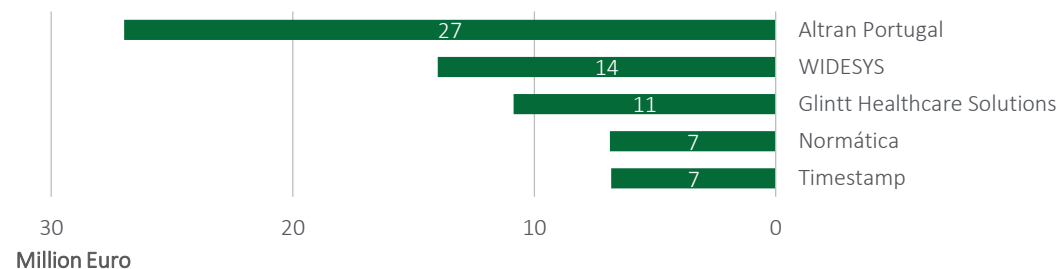
Five main suppliers of information systems and software packages for the Ministry of Health (2017-2020)



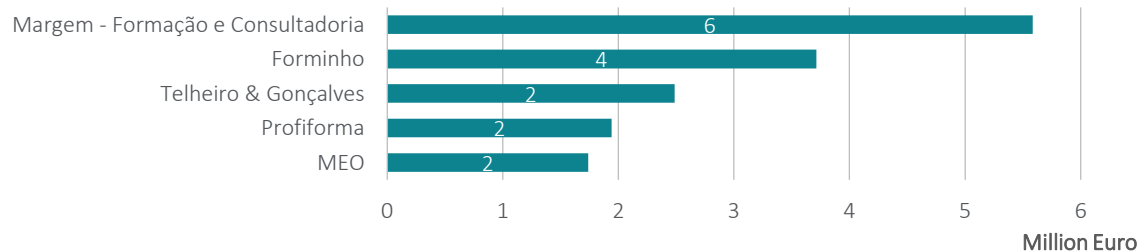
Five main suppliers of IT services: consulting, software, development, internet and support, for public entities (2017-2020)



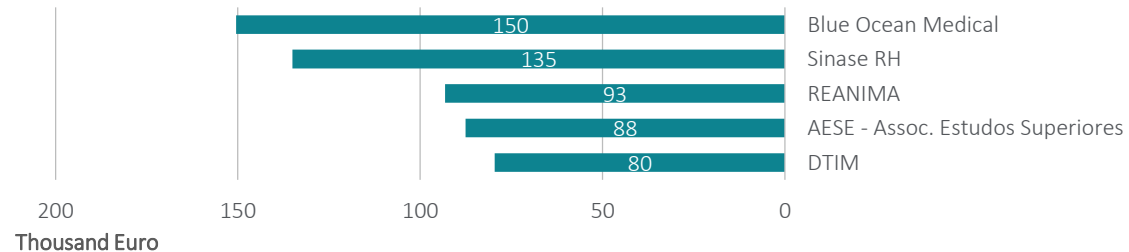
Five main suppliers of IT services: consulting, software, development, internet and support, for the Ministry of Health (2017-2020)



Five main suppliers of education and training services for public entities (2017-2020)



Five main suppliers of education and training services for The Ministry of Health (2017-2020)



2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (4/15)

Detail on the main Portuguese companies with a relevant role in Health Digitalization



Siemens Healthineers, a company part of Siemens, has its mission to enable healthcare providers to increase value by empowering them with precision medicine, transforming care delivery, and improving patient experience, by digitalizing healthcare. The company also offers a set of medical solutions for imaging, diagnosis, advanced therapies, as well as enterprise and digital services.

Relevant case studies



Setup a new CT scan procedure (SOMATOM go.Up), improving the performance of the scan, the efficiency and the patient experience



Partnership at Hospital da Cruz Vermelha, offering Tele-monitoring and e-health solutions for early diagnosis and personalized treatment

Points of contact

João Seabra (Global Head of Enterprise Services)
Ivan Christo França (Country Head Portugal)
Bruno Costa (Head of Sales)

e-mail infogeral.h.pt@siemens.com

Phone +351 229 992 000

Address Rua Irmãos Siemens, 1 - 1A 2720-093 Lisboa

Key data

Turnover **EUR 68 M**

Employees **226**

Total Assets **EUR 65,2 M**

Source: www.siemens-healthineers.com/pt/; D&B Hoovers – data from September 2019



Glintt Healthcare develops solutions for health, oriented to the public and private sector. Their team have strong skills in Pharmacy, Nursing, Biomedical, IT, mathematics and management. Nowadays, more than 200 hospitals and clinics use its solutions, which fulfil the requirements of virtually all hospital services, from patient admission to prescription, recording of consultations and medicinal products, invoicing and contacts between patients and the healthcare facility.

Relevant case studies



Development of a business intelligence solution, for an easier, reliable and systematic decision makers access to information



Member of “Connected Healthcare”, a taskforce created by COTEC Portugal with the aim of quantify the impact of connectivity and the use of a more “intelligent” management and decision environment

Points of contact

Nuno Vasco Lopes (Chief Executive Officer)
Flávio Teixeira (Healthcare Solutions Director)
Célia Ribeiro (Head of Business Development)

e-mail info@glintt.com

Phone +223 401 700

Address Beloura Office Park – Edf.10, Quinta da Beloura 2710-693 Sintra

Key data

Turnover **EUR 17 M**

Employees **293**

Total Assets **EUR 23,7 M**

Source: www.glintt.com/en/Pages/home.aspx; D&B Hoovers – key data from December 2019

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (5/15)

Detail on the main Portuguese companies with a relevant role in Health Digitalization



BIQ Health Solutions is a consulting firm with a particular focus on healthcare sector, engaged in delivery services towards the implementation of Management Systems, Logistics and Information Systems. The firm is also proficient in Hospital Engineering areas, namely those concerning the design and implementation of projects pertaining healthcare logistical infrastructures.

Relevant case studies



Implementation of the Ekanban® in the new Hospital Lusíadas Braga, a solution to manage clinical stock and its consumption in real-time



Implementation of the SteriTrace® Solution at Maria Cecilia Hospital (Italy), improving the sterilization unit (paperless, information exchange, real-time recording of activities)

Points of contact

Fernando Jorge Alves (Managing Partner)
Maria Manuela Alves (Partner)
Gonçalo Mergulhão (International Sales Director)

e-mail biq.geral@biqhs.com
Phone +351 214 342 600

Address Rua Ferreira de Castro, 20C, 2730-081
Barcarena

Key data

	Turnover	EUR 2,5 M
	Employees	21
	Total Assets	EUR 3 M

Source: www.biqhs.com; D&B Hoovers – key data from December 2019



First Solutions operates in information systems and it is specialized in IT healthcare market. It has a vast portfolio based on innovative technologies and on a team with a wide know-how and experience in IT health sector. The company presents the following set of solutions for this particular market: Clinical services management platform, clinical and administrative management, screening management platform, monitoring system for healthcare infections control, business analytics, application integration platform, telemedicine platform, and Saas/Cloud.

Points of contact

José Correia de Sousa (Chief Executive Officer)
Carlos Cordeiro (Chief Operations Officer)
Nuno Pinto (Sales Manager)

Key data

e-mail geral@first-global.com
Phone +351 226 057 310
Address Centro de Inovação de Matosinhos
Rua Conselheiro Costa Braga, 502F
4450-102 Matosinhos

	Turnover	EUR 2,5 M
	Employees	40
	Total Assets	EUR 10,5 M

Source: www.normatica.pt; D&B Hoovers; Data from December 2019

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (6/15)

Detail on the main Portuguese companies with a relevant role in Health Digitalization






Oramix is a Portuguese company with strong competencies in management of technological infrastructures and database administration. The company developed a solid Oracle-based strategy (being a Oracle Platinum Partner and a Microsoft Gold Partner), with which developed a wide set of projects in Public Sector, Media & Telecom, Banking & Insurance, Industry, and Health.

Points of contact

Luís Meira (Chief Executive Officer)
Maria José Barreto (Chief Operations Officer)
Pedro Emiliano (Business Development Manager)

e-mail oramix@oramix.pt
Phone +351 214 239 345
Address Lagoas Park, Edifício 8, Piso 1
2740-244 Porto Salvo

Key data

 Turnover	EUR 8,2 M
 Employees	90
 Total Assets	EUR 5 M

Source: www.oramix.com; D&B Hoovers – key data from December 2019



Widesys is a business consultancy firm in the technological field, with extensive experience in defining and implementing solutions and best practices in organizations. In particular, this company offers wide variety of technological services, namely service management, digital transformation, process and business management, infrastructure and automation, asset management and continuous improvement and innovation.

Points of contact

João Menino (Managing Partner)
Eduardo Ribeiro (Business Development Manager)

e-mail info@widesys.com
Phone +351 214 537 263
Address Edifício Central PCTA, Herdade da Barba
Rala, Rua Luís Adelino Fonseca, 7005-841, Évora

Key data

 Turnover	EUR 1,2 M
 Employees	28
 Total Assets	EUR 2,7 M

Source: www.widesys.com; D&B Hoovers – key data from December 2016

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (7/15)

Detail on the main Portuguese companies with a relevant role in Health Digitalization

SECTRA

Sectra is a leading global provider of imaging IT solutions that support healthcare in achieving patient-centric care. This company offers an enterprise imaging solution comprising Picture Archiving and Communication System (PACS) for imaging-intensive departments (radiology, pathology, cardiology, orthopedics), Vendor Neutral Archive (VNA), and share and collaborative solutions.

Relevant case studies



Installation of a digital pathology solution for better diagnosis and more accurate communication, increasing the efficiency time per case



Sectra PACS image-enables EMR at a public-private partnership hospital system in Portugal

Points of contact

Carlos Cardoso
(Country Manager Iberia and France)

e-mail info.iberia@sectra.com

Phone +351 308 806 200

Address Rua Roberto Ivens, 1333

3º - 3.2, 4450-257 Matosinhos

Key data

Turnover **EUR 1,3 M**

Employees **4**

Total Assets **n.a.**

Source: www.medical.sectra.com; D&B Hoovers – key data from December 2019

GONKSYS

GONKSYS is a company specialized in integrated ITC and technology solutions, offering a complete IT/IS product and services portfolio, focused on data center (data protection, IT infrastructure, virtualization), networking (asset management, multimedia systems, network), security (firewalling, IT security systems, VPN) and unified communication (IP telephony, collaboration, contact center, video conferencing). GONKSYS seeks to respond to requests and have an active part in economic-financial, social, educational and health sectors.

Relevant case studies



Partnership in setting-up, manage and maintain the Kaspersky Endpoint Security for Business Advanced in Colep

Points of contact

Gonçalo Veiga (Administrator)

Nuno Nogueira (Operations Manager)

Pedro Fonseca (Sales Manager)

e-mail geral@gonksys.com

Phone +351 223 217 500

Address Rua António Nicolau D'Almeida, 45 – 1.8,

Edifício Porto Office, 4100-320 Porto

Key data

Turnover **EUR 7,1 M**

Employees **42**

Total Assets **EUR 3,6 M**

Source: www.gonksys.com/en/; D&B Hoovers – key data from December 2019

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (8/15)

Detail on the main Portuguese companies with a relevant role in Government Digitalization



Novabase is a Portuguese company focused on providing IT consultancy and solutions development. The company presents a wide solutions portfolio in different areas, namely financial services business solutions, digitalization and automation (particularly, the Celfocus offering), government, transports and energy solutions, and venture capital.

Points of contact

João Nuno Bento (Chief Executive Officer)
Álvaro Ferreira (Chief Operating Officer)

Contact <https://www.novabase.pt/pt/dp/contactenos>

Phone +351 213 836 300

Address Av. D. João II, nº34, Parque das Nações,
1998-031 Lisboa

Key data

 **Turnover** EUR 17 M

 **Employees** 259

 **Total Assets** EUR 52,5 M

Source: www.novabase.pt; D&B Hoovers – key data from December 2018



Informática El Corte Inglés is now part of Inetum, an agile IT services group that provides digital services, namely infrastructure, application or software. Furthermore, Inetum develops solutions focused on smart cities, industry 4.0, omni-commerce, digital banking or cybersecurity paradigm, having a deep experience regarding applications development for Public Administration.

Relevant case studies



Strategic partnership with Cisco and Microsoft in projects of Cloud, Security and Collaboration areas



Dell EMC's Infrastructure and migration solutions to the Cloud

Points of contact

Abel Costa (Managing Director Portugal)
Sandra Monraia (Business Development Director)

e-mail geral@gfi.pt

Phone +351 210 499 950

Address Edifício Atlantis, Avenida D. João II, Nº 44C,
Piso 4, Parque das Nações

Key data

 **Turnover** EUR 32 M

 **Employees** 33

 **Total Assets** EUR 9,5 M

Source: www.gfi.world/pt-pt/; D&B Hoovers; Data from February 2019

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (9/15)

Detail on the main Portuguese companies with a relevant role in Government Digitalization



SAP is the market leader in enterprise application software, which integrates back-office functions such as analytics, accounting, distribution and human resources, and comes in on-premises and cloud-linked forms. Moreover, its machine learning, Internet of Things (IoT), and advanced analytics technologies help turn customers' businesses into intelligent enterprises.

Relevant case studies



Lisbon Metro with a 360° business view: harmonization of IoT (ticketing system data) with the financial data in real time



Member of a partnership to the development of an analytical model for predicting emergencies in Lisbon

Points of contact

Luís Carrasqueira (General Manager)
Nuno Saramago (Chief Operating Officer)
José Tavares (Solutions and Innovation Director)

Phone +351 214 465 500

Address Lagoas Park, Edifício 14, Piso 0
2740-262 Porto Salvo

Key data

 **Turnover** EUR 118 M

 **Employees** 434

 **Total Assets** EUR 93,3 M

Source: www.sap.com/portugal/index.html; D&B Hoovers – key data from December 2019



Bizdirect is a reference player in the commercialization of multi-brand IT Solutions, supported in partnerships with the main manufacturers in the market, and in the Management of Corporate Software Licensing Contracts, based on new business models. Regarding the solutions provided, Bizdirect offers expertise and consultancy in digital infrastructure, modern workplace, customer intelligence and business process optimization.

Relevant case studies



Development of a solution, based on Microsoft Azure, focused on the IT infrastructure modernization, management, monitoring, and security



Upgrade of the Microsoft Dynamics CRM platform from the 2011 version to Dynamics 365 (online), as well as improvements implementation in their customer and commercial system

Points of contact

João Mira Santiago (Chief Executive Officer)
Rita Herédia Cordovil (Business Development Director)
Jorge Félix (Business Development & Strategic Partnership)

e-mail contact@bizdirect.pt

Phone +351 210 100 524

Address Lugar do Espido, Via Norte
4470-177 Maia

Key data

 **Turnover** EUR 74 M

 **Employees** 87

 **Total Assets** EUR 23 M

Source: www.bizdirect.pt; D&B Hoovers; Data from December 2019

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (10/15)

Detail on the main Portuguese companies with a relevant role both in Government and Health Digitalization

claranet

Claranet is a multinational managed services provider, with presence in Portugal, offering fully managed hosting, network security and solutions services to help businesses reduce costs and risks. This group is one of only five vendors in the world that has all three audited MSP certifications from the hyperscalers: Microsoft Azure, AWS and Google Cloud Platform.

Relevant case studies



Private cloud infrastructure for Amnesty International



Increase the capacity of Unicef's digital infrastructure

Points of contact

António Miguel Ferreira (Managing Director)
Renato Paço (Operations Executive Director)
José Franco (Business Development Manager)

e-mail suporte@claranet.pt

Phone +351 707 505 152

Address Av. D. João II, 1.07 - 2.1, 4º, 1998-014 Lisboa

Key data

Turnover **EUR 109 M**

Employees **425**

Total Assets **EUR 48 M**

Source: www.claranet.pt; D&B Hoovers – key data from December 2018

ALTRAN

Altran, currently a part of Capgemini Group, is a global leader in consulting and R&D, digital transformation, technology and engineering services. The Group is at the forefront of innovation, regarding cloud, digital and platforms thematic, directing its operation in key sectors such as aerospace, automotive, defense, energy, finance, life sciences, rail, and telecom, among others.

Relevant case studies



Partnership with Biovotion for the development of safe and discreet medical monitoring solutions, contributing to the adoption of healthier lifestyle habits



Partnership with Natixis in order to transfer its main IT services from Paris to Porto in a 3-year time horizon

Points of contact

Célia Reis (Chief Executive Officer)
Hugo Oliveira (Financial Services & Government Director)
Francisco Almeida (Business Development Manager)
e-mail info.pt@altran.com
Phone +351 210 331 600

Address Av. D. João II, Lote 1.07.2.1 Piso 2, 1990-096 Lisboa

Key data

Turnover **EUR 91 M**

Employees **2.200**

Total Assets **EUR 57,9 M**

Source: www.altran.com/pt/pt-pt/; D&B Hoovers – key data from February 2019

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (11/15)

Detail on the main Portuguese companies with a relevant role both in Government and Health Digitalization



MEO, a company part of Altice Group and renown as a Websummit technology partner, is one of the biggest telecommunications and multimedia company in Portugal. Having Portugal Telecom as its genesis, this company had a deep contribution to the development of the telecommunications infrastructure in Portugal, currently playing a major role in IPTV, mobile, network and in the 5G establishment.

Relevant case studies



Portugal Telecom introduces its triple play service, named MEO, becoming a worldwide case-study (2008)



TMN launches the third mobile generation (3G) and became the third European operator to introduce mobile video calls (2004)

Points of contact

Alexandre Filipe Fonseca (Chief Executive Officer)
Alexander Freese (Chief Operations Officer)
Inês Nunes (Head of Strategy and Business Development)

Contact <https://www.telecom.pt/pt-pt/contactos>
Address Avenida Fontes Pereira de Melo n.º 40,
1069-300 Lisboa

Key data

	Turnover	EUR 1,9 B
	Employees	6.600
	Total Assets	EUR 6,9 B

Source: www.meo.pt; D&B Hoovers –
key data from December 2018



NOS Comunicações is one of the biggest telecommunications and multimedia company in Portugal. Beyond its mainstream supply of fixed and mobile communications, network, television and multimedia services, the company also provides a wide offering for business and institutional segment regarding ICT, IT managed services, cloud solutions, business continuity and information security services, supported by state-of-the-art Data Centers.

Relevant case studies



Microsoft and NOS signed a partnership in 2021, in order to accelerate the digital transformation of companies and foster innovation in the telecommunications sector, through 5G, Cloud and IoT



Supply the increase of network quality and bandwidth and the equipment park renovation, to enable the company growth abroad

Points of contact

Miguel Almeida (Chief Executive Officer)
Jorge Graça (Chief Technology and Information Officer)
Pedro Abrantes (Director of Strategy and Business Development)
Phone +351 217 824 700
Address Edifício Campo Grande
Rua Actor António Silva, 9, 1600-404, Lisboa

Key data

	Turnover	EUR 1,3 B
	Employees	1.000
	Total Assets	EUR 3,3 B

Source: www.nos.pt; D&B Hoovers –
key data from December 2019

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (12/15)

Detail on the main Portuguese companies with a relevant role both in Government and Health Digitalization

FUJITSU

Fujitsu is a global information and communication technology (ICT) company, offering a full range of technology products, solutions and services. Particularly in Portugal, its main client is the Public Administration, where the company assures 80% of the documental management.

This firm also position itself in healthcare, developing solutions to maximize productivity and efficiency in the relation healthcare professional-patient.

Relevant case studies



Digital transformation project of the General Secretariat of the Ministry of Internal Administration, updating the 112.pt global system and implementing a new Operational Center



Implementation of a Device-as-a-Service (DaaS) solution, based on a private cloud, in the Ministry of Education

Points of contact

Carlos Barros (Managing Director)

Luís Matias (Head of Sales)

e-mail business.center@ts.fujitsu.com

Phone +351 217 244 444

Address Av. Colégio Militar nº37F -
3ºPiso 1500-180 Lisboa

Key data

 Turnover **EUR 65 M**

 Employees **1.500**

 Total Assets **EUR 34,5 M**

Source: www.fujitsu.com/pt/; D&B Hoovers – key data from March 2016

axians

Axians is the registered trademark of the Vinci Energies group dedicated to ICT and the challenge of Digital Transformation. The company presents a strong specialization in telecoms infrastructures, cloud and datacenters, enterprise networks, digital workspace, business applications and data analytics. Cybersecurity is also a priority in all of these areas.

Relevant case studies



Creation of a Big Data environment, using IBM technologies, at UMCG (Groningen) for improved patient diagnostics



Implementation of a new network infrastructure at Universitätsklinikum Freiburg (3rd largest hospital in Germany), connecting four new data centers and the campus of the University

Points of contact

Pedro Faustino (Managing Director)

Carmo Palma (Managing Director – Digital Enabling)

Nelson Lancha (Head of Alliances & Strategic Partnerships)

e-mail portugal.info@axians.com

Phone +351 214 258 000

Address Edifício Atlantis, Av. Dom João II, 44 C, Piso 5,
1900-095 Lisboa

Key data

 Turnover **EUR 70 M**

 Employees **499**

 Total Assets **EUR 54,5 M**

Source: www.axians.pt/pt/; D&B Hoovers – key data from December 2019

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (13/15)

Detail on the main Portuguese companies with a relevant role both in Government and Health Digitalization



OutSystems is a company that offers a modern AI-powered application platform, enabling organizations of all sizes to develop, deploy and manage omnichannel enterprise applications. This high-potential solution runs in mobile and web enterprise applications, in cloud, on-premises or in hybrid environments, being an outstanding support tool for application modernization, workplace innovation and business process automation.

Relevant case studies



Installation of a new intranet for 14.000 employees in 23 hospitals and support business expansion with a dedicated portal that boosted referral volumes from independent physicians



Development of FocusOn™, a remote monitoring and triaging platform for cardiac conditions that ensures better outcomes for patients

Points of contact

Paulo Rosado (Chief Executive Officer)
Rui Pereira (Vice-President of Digital Transformation)
Gonçalo Gaiolas (Vice-President of Product)

Contact <https://www.outsystems.com/contacts/>
Phone +351 214 153 730
Address R. Central Park 2 2ªA, 2795-242 Linda-a-Velha

Key data

	Turnover	EUR 125 M
	Employees	535
	Total Assets	EUR 143,8 M

Source: www.outsystems.com; D&B Hoovers – key data from December 2019



With a presence in Portugal since 1938, IBM has been at the technological forefront in several areas of information and innovation technologies, standing out today as a world leader in business artificial intelligence, hybrid cloud, business security, blockchain, and quantum. The company has been combining technology and knowledge effectively, in order to create innovative solutions to the problems that systematically affect society in general, business and citizens quality of life.

Relevant case studies



Launch 16 virtual assistants to improve customer satisfaction and employee productivity in Healthcare with Watson Assistant



Build an integrated platform for energy innovation, in a partnership between IBM and SAP

Points of contact

José Manuel Paraíso (Chief Executive Officer)
Beatriz Remón Barreiro (Chief Digital Officer Spain, Greece, Portugal and Israel)
Rui Santos (Portugal Sales Leader)
Contact <https://www.ibm.com/contact/pt/pt/>
Phone +351 218 927 000
Address Rua Do Mar Da China, 3
Lisboa, 1990-138

Key data

	Turnover	EUR 169 M
	Employees	434
	Total Assets	EUR 183,2 M

Source: www.ibm.com/pt-en; D&B Hoovers – key data from December 2019

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (14/15)

Detail on the main Portuguese companies with a relevant role both in Government and Health Digitalization

timestamp

Timestamp Group integrates several companies with Portuguese capitals, investing in technological leadership, which is based on quality, certification and continuous training, and also in the development and provision of innovative services. Concretely, Timestamp company is specialized in information systems consulting, maintenance and support, Oracle infrastructure, and ERP, CRM and HCM implementation.

Relevant case studies



Implementation of organizational changes at *Centro Hospitalar de Lisboa Ocidental* to assure the compliance with GDPR

PARFOIS Implementation of Oracle Enterprise Planning and Budgeting Cloud at Parfois

Points of contact

João Veiga (Chief Executive Officer)
Nuno Dias (Managing Director – Digital Security & Governance)
Luís Fidalgo (Sales Director)
e-mail sales@timestamp.pt
Phone +351 213 504 870
Address Praça de Alvalade Nº 6 – 11º F
1700-036 Lisboa

Key data

	Turnover	EUR 31 M
	Employees	240
	Total Assets	EUR 20,8 M

Source: www.timestampgroup.com/; D&B Hoovers – key data from December 2019

NORMÁTICA

Normática offers solutions for software licensing and support, open source, consulting, hardware and biometric services, being a reference in the sector in Portugal. The company as a particular specialization regarding the Public Sector, particularly the Central and Local Public Administration, Health and Education, with technological contributions regarding Business Intelligence solutions, infrastructures and network, as well as biometry.

Points of contact

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Madalena de Almeida (Chief Operations Officer)

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Phone +351 213 041 600

Address

Rua de Pedrouços Nº28, 1400-290 Lisboa

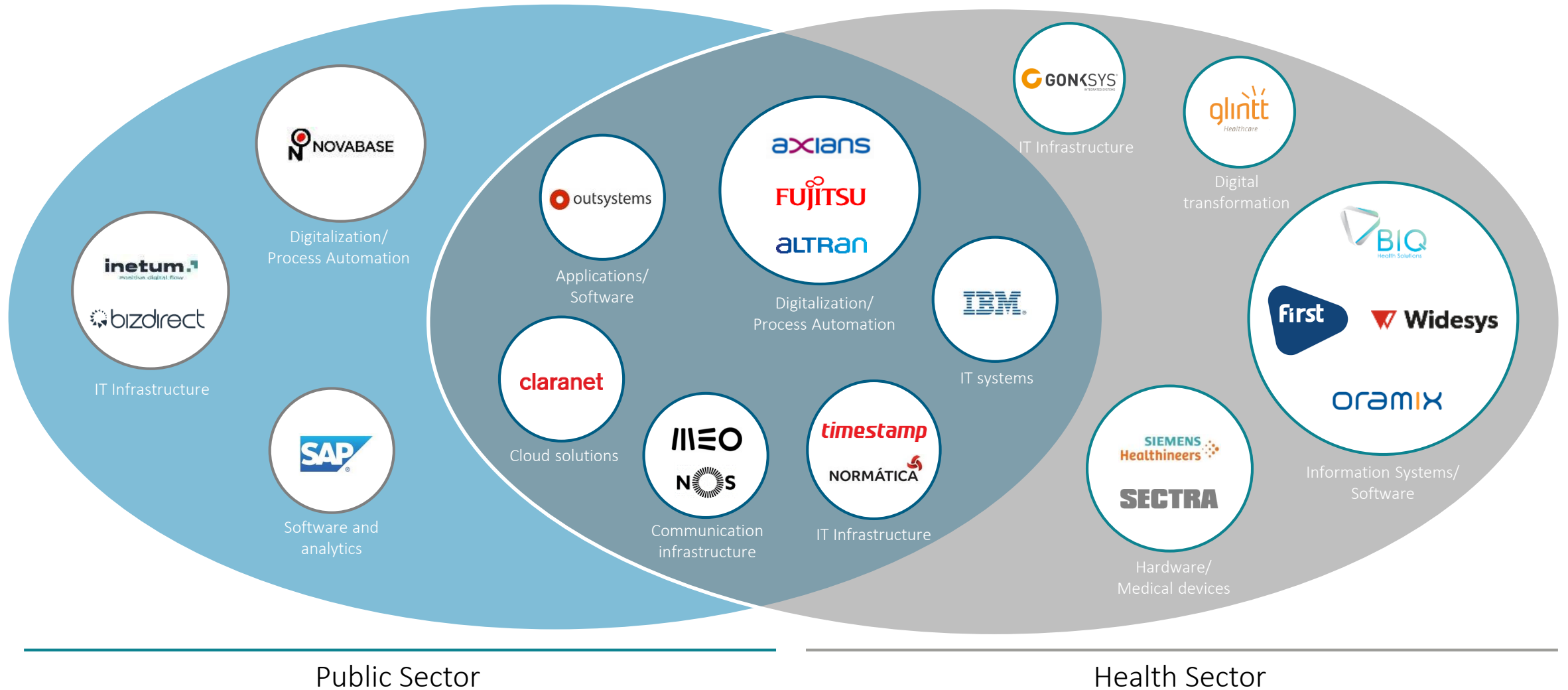
Key data

	Turnover	EUR 11 M
	Employees	19
	Total Assets	EUR 13,7 M

Source: www.normatica.pt; D&B Hoovers; Data from December 2019

2. Competition and assessment analysis

Assessment of Portuguese companies in digital transition (15/15)



2. Competition and assessment analysis

Overview of the Portuguese digital companies' potential and relevant gaps (1/2)

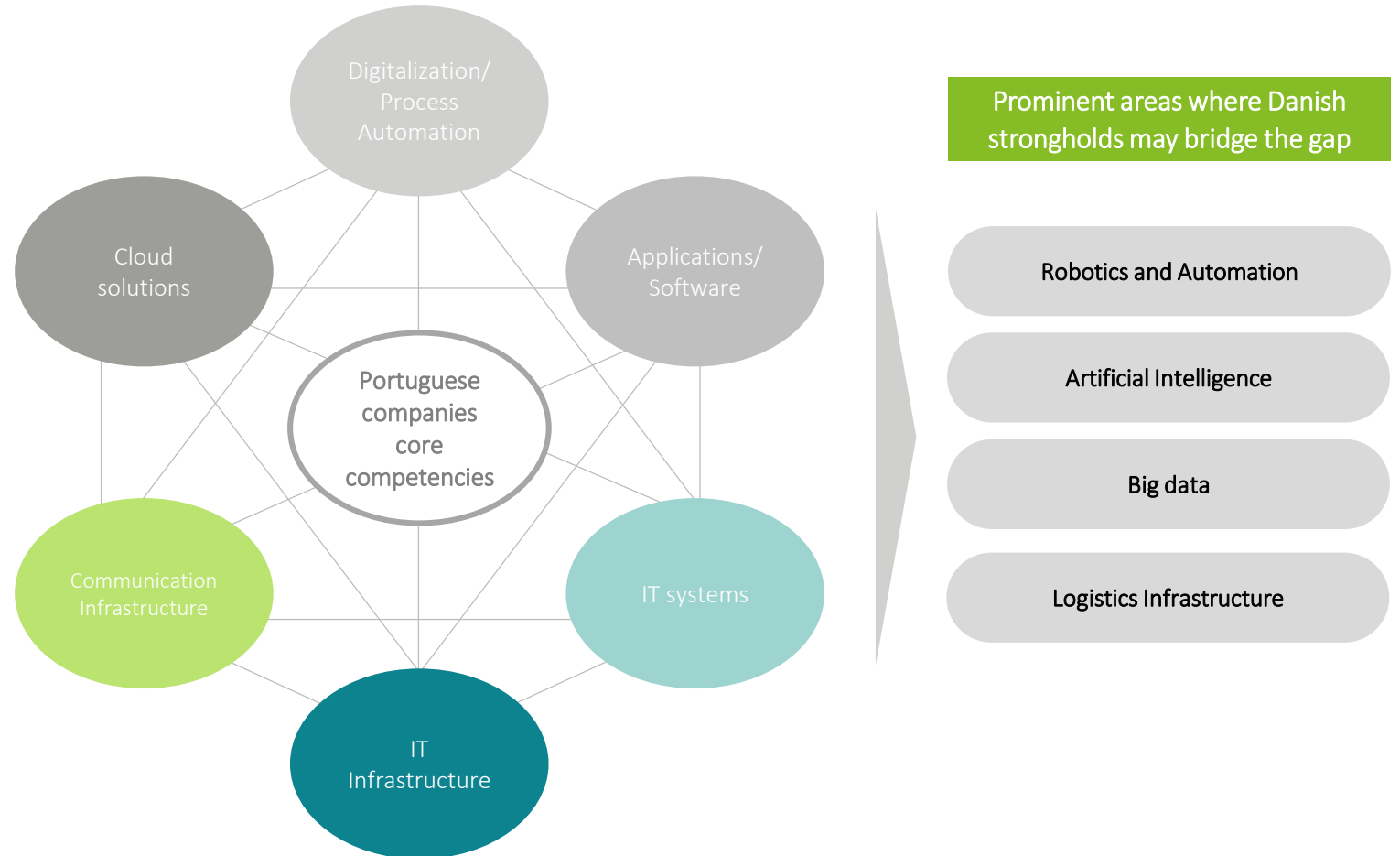
Portuguese companies core competencies and the gap to be bridged

From the previous bios presented and the segmentation analysis provided, it is possible to highlight that **major companies currently supplying the Portuguese State can address a wide set of technological/digital areas, representing true champions for the country's digital transition.**

Some of these companies are hybrid players and can be seen as jokers, once they play, or can play, an active role in both Public and Health sectors.

Thus, one can conclude that these companies are ready to answer challenges from both sectors, being endowed with a high level of specialization and technological knowledge.

However, there are specific key competencies or expertise areas that need to be fulfilled. In this regard, **Danish strongholds, due to their experience and technological capacity, have a clear ambitious space to play a relevant role, exploring partnership and synergies with Portuguese key players.**



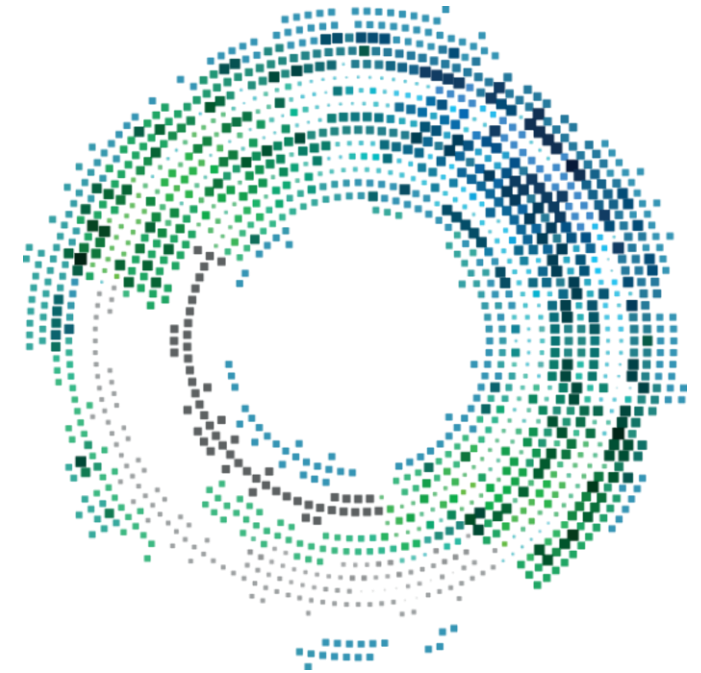
2. Competition and assessment analysis

Overview of the Portuguese digital companies' potential and relevant gaps (2/2)

Conclusions

From this particular chapter, the following conclusions may be highlighted:

- There is a clear growth trend in the procurement of digital services/technologies by the Public Sector and Public companies, only slightly reversed throughout the pandemic outbreak witnessed in 2020. **The implementation of RRP will contribute to foster this tendency, generating additional relevant investment opportunities;**
- The Ministry of Health accounted for 15% of total public acquisitions for digital services in 2020, a growth of 3 percentage points in comparison with the previous year. **There is an expectation that this tendency may even speed up this decade**, not only because of the ongoing response to the Covid-19 context, but also due an elderly population that increases the pressure on National Health System. This paradigm requires **a higher investment level in health, with more advanced and sophisticated health facilities, with RRP positioning itself as the primary instrument to answer these needs;**
- **A wide set of Portuguese and multinational companies**, with subsidiary located in Portugal, **present strong technological competencies to address the identified needs**, with the majority being able to cover the Public and Health Sectors;
- The prominent areas presented in the previous slide set out the domains where it is anticipated a better suit between Portuguese needs and Danish specialization. Moreover, **Danish strongholds can address, with high added-value, all the areas presented as core competencies from the Portuguese side**, as well as other areas not previously mentioned;
- The **setting-up of project consortiums, technological workshops and proposals to answer specific investment needs expressed within RRP** must be the strategy forward.



3. Opportunities for Danish companies



3. Opportunities for Danish companies

An outlined approach to maximize Danish strongholds comparative advantages

Opportunity matrix for Danish strongholds

Danish players can have a relevant role in regard of the Portuguese RRP opportunities. Due to their technological capabilities, know-how and experience in emergent areas that are still not fully dominated by Portuguese main players, Danish players have the credentials to become a major part of the ambitious digital transition.

In this chapter, an approach that seeks to connect the investment needs for each funding opportunity with potential Portuguese partners is followed, being presented as an opportunity matrix. The aim of this matrix is to guide Danish strongholds in terms of expected action areas for each investment opportunity, fostering, at the same time, access to potential partners for specific opportunity domains.



3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area

Social Vulnerabilities – National Health System

Funding		Opportunities	Potential partners		
Specific Cluster	Investment Amount Available*		Companies	Action area	
Care of Primary Health	EUR 463 M	Integrated information system	Widesys, BIQ Health Solutions, Oramix, First Solutions	Information Systems/ Software	
			Siemens Healthineers, Sectra	Hardware	
			Glintt Healthcare	Digital Transformation	
		Build new health units/centers	Fujitsu, Axians, Altran	Digitalization/ Process Automation	
			Widesys, BIQ Health Solutions, Oramix, First Solutions	Information Systems/ Software	
			Normática, Timestamp	IT Infrastructure	
			MEO, NOS	Communication Infrastructure	
			Dentistry offices	Widesys, BIQ Health Solutions, Oramix, First Solutions	Information Systems/ Software

* Non-exhaustive.

3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area

Social Vulnerabilities – National Health System

Funding		Opportunities	Potential partners	
Specific Cluster	Investment Amount Available*		Companies	Action area
Primary Health Care	EUR 463 M	Teleconsultations and telemonitoring	Glintt Healthcare	Digital Transformation
			MEO, NOS	Communication infrastructure
			Siemens Healthineers, Sectra	Hardware
		Integrated diagnostic centers	Fujitsu, Axians, Altran	Digitalization/ Process Automation
			Claranet	Cloud based hosting solutions
			MEO, NOS	Communications Infrastructure
Digital Transition in Health	EUR 300M	Data network	Claranet	Cloud based hosting solutions
			MEO, NOS	Communications Infrastructure

* Non-exhaustive.

3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area

Social Vulnerabilities – National Health System

Funding		Opportunities	Potential partners	
Specific Cluster	Investment Amount Available*		Companies	Action area
Digital Transition in Health	EUR 300 M	Standardization and digitalization	Fujitsu, Axians, Altran	Digitalization/ Process Automation
			Glantt Healthcare	Digital transformation
		Modernization of current work processes	Widesys, BIQ Health Solutions, Oramix, First Solutions	Information Systems/ Software
			Outsystems	Applications/Software
			Fujitsu, Axians, Altran	Digitalization/ Process Automation
			Normática, Timestamp	IT Infrastructure
			Normática, Timestamp	IT Infrastructure
		Normalization of critical data	Widesys, BIQ Health Solutions, Oramix, First Solutions	Information Systems/ Software

* Non-exhaustive.

3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area

Social Vulnerabilities – National Health System

Funding		Opportunities	Potential partners	
Specific Cluster	Investment Amount Available*		Companies	Action area
Equipment for Hospitals - Seixal, Sintra and Lisbon	EUR 196 M	Equipment acquisition	Siemens Healthineers, Sectra	Hardware
		Build 4 intern units in general hospitals	Siemens Healthineers, Sectra	Hardware
Mental health reform	EUR 85 M	Build a new forensic unit (Sobral Cid) and remodel two others (CHPL and HML)	MEO, NOS	Communications Infrastructure
			Normática, Timestamp	IT Infrastructure
		Digital technologies to support patient monitoring	Glintt Healthcare	Digital transformation
Digital Transition in Health - Madeira	EUR 15 M		Normática, Timestamp	IT infrastructure
		Telehealth	Glintt Healthcare	Digital transformation
		ICT and artificial intelligence for epidemiological surveillance	IBM	IT systems

* Non-exhaustive.

3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area

Social Vulnerabilities – National Health System

Funding		Opportunities	Potential partners	
Specific Cluster	Investment Amount Available*		Companies	Action area
Digital Transition in Health - Madeira	EUR 15 M	Digitalization and interoperability of the information system	Fujitsu, Axians, Altran	Digitalization/ Process Automation
			Widesys, BIQ Health Solutions, Oramix, First Solutions	Information Systems/ Software
		Train citizens and stakeholders	Blue Ocean Medical, Sinase RH**	Training
Digital Hospital in Azores	EUR 30 M	Digitalization of the Health Sector	Fujitsu, Axians, Altran	Digitalization/ Process Automation
		Electronic health record for each citizen	Widesys, BIQ Health Solutions, Oramix, First Solutions	Information Systems/ Software
			Normática, Timestamp	IT infrastructure
		Share the clinical information between all levels of care with health professional	Widesys, BIQ Health Solutions, Oramix, First Solutions	Information Systems/ Software
			Normática, Timestamp	IT infrastructure

* Non-exhaustive.

** Despite not being included in the short bios presented previously, these companies are the main Portuguese State suppliers regarding training in the Health Sector.

3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area
Digital Public Administration

Funding		Opportunities	Potential partners	
Specific Cluster	Investment Amount Available*		Companies	Action area
Digital Transition in Justice and Business Environment	EUR 267 M	Digital Courts Platforms	Inetum, BizDirect, Timestamp, Normática	IT infrastructure
		Development and implementation of procedural processing systems in all courts and instances	Claranet	Cloud solutions
		Digital Platforms for Citizens and Business Life Cycles and for Criminal and Forensic Investigation	Outsystems	Applications/Software
			IBM	IT systems
		Strengthening of Infrastructures, Equipment and Technological Architectures	Novabase, Axians, Fujitsu, Altran	Digitalization/ Process Automation
		Knowledge management platforms		

* Non-exhaustive.

3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area
Digital Public Administration

Funding		Opportunities	Potential partners	
Specific Cluster	Investment Amount Available*		Companies	Action area
Sustainable electronic services based on interoperability and data utilization	EUR 102 M	Increase governance and the ability to securely reuse data in PA	Novabase, Axians, Fujitsu, Altran	Digitalization/ Process Automation
		Strengthen “Dados.Gov” service as an open data portal for PA	Claranet	Cloud solutions
			SAP	Software and analytics
			Outsystems	Applications/ Software
		Promote the creation of integrated infrastructures for specific purposes	IBM	IT systems
		Inetum, BizDirect, Timestamp, Normática	IT infrastructure	

* Non-exhaustive.

3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area
Digital Public Administration

Funding		Opportunities	Potential partners	
Specific Cluster	Investment Amount Available*		Companies	Action area
National Program for Training and qualification of the Public Administration	EUR 98 M	<p>Infoexclusion Zero</p> <p>PA Digital 4.0</p> <p>Implement the objectives of the <i>Qualifica AP</i> Program</p>	<p>Margem – Formação e Consultoria**</p> <p>Forminho**</p> <p>MEO</p>	Training

* Non-exhaustive.

** Despite not being included in the companies bios presented previously, these companies are the main Portuguese State suppliers regarding training in the Health Sector.

3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area
Digital Public Administration

Funding		Opportunities	Potential partners	
Specific Cluster	Investment Amount Available*		Companies	Action area
Digital Portal of Public Services and multichannel services	EUR 198 M	Provide a Unique Digital Services Portal	Novabase, Axians, Fujitsu, Altran	Digitalization/ Process Automation
			Outsystems	Applications/Software
			Inetum, BizDirect, Timestamp, Normática	IT infrastructure
		Create and make available a Contact Center	Claranet	Cloud solutions
			SAP	Software and analytics
			Novabase, Axians, Fujitsu, Altran	Digitalization/ Process Automation
			Expand the network of Citizen Stores, Citizen Spaces and Mobile Citizen Spaces	MEO, NOS
		Inetum, BizDirect, Timestamp, Normática		IT infrastructure

* Non-exhaustive.

3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area
Digital Public Administration

Funding		Opportunities	Potential partners	
Specific Cluster	Investment Amount Available*		Companies	Action area
Digital Transition in Social Security	EUR 200 M	Reorganization and modernization of the Social Security Information system	Inetum, BizDirect, Timestamp, Normática	IT infrastructure
			Novabase, Axians, Fujitsu, Altran	Digitalization/ Process Automation
			Claranet	Cloud solutions
		Implementation of a new technological relationship model (360º Vision)	Outsystems	Applications/Software
			IBM	IT systems
			Novabase, Axians, Fujitsu, Altran	Digitalization/ Process Automation
		Implement infrastructure solutions, based on cloud, for Social Security systems	Claranet	Cloud solutions
			Inetum, BizDirect, Timestamp, Normática	IT infrastructure

* Non-exhaustive.

3. Opportunities for Danish companies

Matrix analysis of RRP opportunities and potential areas of partnership with Portuguese players

RRP Policy Area
Digital Public Administration

Funding		Opportunities	Potential partners	
Specific Cluster	Investment Amount Available*		Companies	Action area
Digital Transition in The Public Administration of Madeira and Azores	EUR 103 M	Provide Madeira with high-capacity digital broadband networks	MEO, NOS	Communication infrastructure
		Digital infrastructure in Azores Public Administration	Inetum, BizDirect, Timestamp, Normática	IT infrastructure
			IBM	IT systems
			Novabase, Axians, Fujitsu, Altran	Digitalization/ Process Automation
			Claranet	Cloud solutions

* Non-exhaustive.

4. Public procurement framework and legal tendering



4. Public procurement framework and legal tendering

Public procurement and global legal framework in Portugal

All public contracts executed by entities in the traditional public sector or that are considered bodies governed by public law fall within the scope of public procurement rules contained in the Public Contracts Code (“PCC”).

The PCC transposed EU Directives 2014/23/EU, 2014/24/EU and 2014/25/EU of 26 February and EU Directive 2014/55/EU of 16 April. Portugal embraced e-procurement, implemented via private platforms, in 2009 and nowadays the e-procurement environment system is well-established, covers the entire procurement value chain, and is often cited as a source of best practices for other EU Member States.

Other specific legal rules may also be relevant in the assessment of opportunities within the scope of the RRP, including:

- Rules applicable to projects involving the awarding and managing of grants;
- Procurement of R&D and innovation products and services;
- The award of tax incentives to Foreign Direct Investment.



4. Public procurement framework and legal tendering

Main concepts for potential bidders to consider



Participation criteria

Other than the excluding grounds foreseen in the PCC, that follow EU public procurement Directives (e.g. insolvency, conviction for crimes affecting professional honorability, default to tax or social security authorities), contracting authorities are only allowed to assess bidders' qualifications if they launch a procedure with a qualification phase. The qualitative criteria, in such cases, shall refer to the economic and financial standing of the bidder and to its technical and professional ability.



Award criteria

Most economically advantageous bid, which may assume one of the following regimes:

- (i) best price-quality relationship - the award criteria consist of a group of factors, and sub factors, concerning aspects of the execution of the contract to be entered into (e.g. quality, price, technical merit, aesthetic and functional characteristics, environmental characteristics, operating costs, after-sales services and technical assistance, delivery date, etc.);
- (ii) evaluation on the price or the cost (in which case the tender documents shall establish all other aspects of the execution of the contract to be entered into).

4. Public procurement framework and legal tendering

Electronic addresses to consider

Regarding public procurement and tendering, a set of electronic addresses must be considered. Below, we present the most relevant channels for this effect:



<https://www.base.gov.pt/Base4/en/>

Public Procurement Portal that centralizes the most important information on all pre-contractual procedures, thus enabling their follow-up and monitoring.

The procedure documents (namely the program and the specifications) are available for download at the electronic platform used by the contracting entity. These are the licensed platforms in Portugal:



<https://www.acingov.pt/acingovprod/2/>



<https://anogov.com/r5/en/>



<https://www2.compraspt.com/v5/en/home>



<https://www.vortal.biz/vortalgov/>



<https://www.saphetygov.pt/>

There are no costs for the supplier companies subscribing to the platforms for services available directly on the platform to respond to a public procedure. Without prejudice to this free access, the legislation imposes some requirements which are not the direct responsibility of the electronic platforms and which may imply costs for the entities using the electronic platforms (e.g. obtaining a digital certificate and chronological validation seals issued by an accredited certification body).

4. Public procurement framework and legal tendering

RRP expected tender procedures ^(1/3)

Main award procedures in PCC	Brief description
Direct award	A procedure whereby the awarding entity invites only one entity to present its bid.
Prior consultation	A procedure whereby the awarding entity invites at least three potential bidders to present their bids. The awarding entity may then negotiate with the bidders some previously identified features of the contract.
Open tender	A procedure that starts with a publication of a notice in an official journal and any interested party may submit a bid, which shall be assessed pursuant to the award criteria established in the tender documents.
Restricted tender with Prior qualification	Also starts with a notice, for candidates to present their applications, and only the ones that are considered qualified candidates, pursuant to a set of predetermined technical and financial requirements, are invited to submit bids.
Negotiation procedure	Similar to the restricted tender but including a phase where bids are negotiated between the bidders and the awarding entity.
Competitive dialogue	A more uncommon procedure, whereby the awarding entity discusses with the bidders how to meet a requirement for which no solution, or no clear solution, is yet known. It includes: the submission of the applications and qualification of the candidates; presentation of the solutions and dialogue with the qualified candidates; and presentation and analysis of the proposals and award of the contract.
Innovation Partnership	A procedure intended for the development and subsequent acquisition of a good or service that is still unavailable on the market. This procedure has three phases, which may be adapted according to the complexity and financial importance of the partnership to be established: submission of applications; submission of proposals of R&D projects by qualified candidates; and negotiation of proposals and award of the partnership.

4. Public procurement framework and legal tendering

RRP expected tender procedures ^(2/3)

General overview of main stages of procedures	Invitation / Notice	Qualification phase	Bid submission	Negotiation	Preliminary decision	Prior hearing	Award / Signing	Indicative timeline
Direct award	Invitation	X	✓	X (but bidder may be requested to improve bid)	X	X	✓	1,5 - 3 months
Prior consultation	Invitation	X	✓	✓ (possible)	✓	✓	✓	4 - 10 months
Open tender	Notice	X	✓	X (possible only in restricted cases)	✓	✓	✓	8 - 12 months
Restricted tender with Prior qualification	Notice	✓	✓	X	✓	✓	✓	10 - 14 months
Negotiation procedure	Notice	✓	✓	✓	✓	✓	✓	12 - 16 months
Competitive dialogue	Notice	✓	✓	X ("dialogue" occurs prior to bid submission)	✓	✓	✓	14 - 18 months
Innovation Partnership	Notice	✓	✓	✓	✓	✓	✓	16 - 20 months

4. Public procurement framework and legal tendering

RRP expected tender procedures ^(3/3)

Depending upon the choice of the award procedure, there may be a threshold for individual contract coverage, as pictured by the following examples:

Award procedure	Type of contract	Value (current)	Specific changes for RRP* (proposal)
Direct award	Lease or acquisition of assets and provision of services	<€20.000,00 (general) or <€5.000,00 (simplified)	≤€15.000,00 (simplified)
	Public Works	<€30.000,00 (general) or <€10.000,00 (simplified)	≤€15.000,00 (simplified)
Prior consultation	Lease or acquisition of assets and provision of services	<€75.000,00	Below applicable EU threshold (€139.000,00 - Central Government or €214.000,00 - other awarding authorities) Procedure is simplified, but at least 5 entities
	Public Works	<€150.000,00	<€750.000,00 Procedure is simplified, but at least 5 entities
Open tender	National Lease or acquisition of assets and provision of services	Below applicable EU threshold (€139.000,00 - Central Government or €214.000,00 - other awarding authorities)	No change, but procedure is simplified
	Public Works and Concession Agreements	Below applicable EU threshold (€5.350.000,00)	No change, but procedure is simplified
	International All contracts	Any value	No change

* There is an ongoing legislative process aimed at introducing some changes to the Public Procurement rules, particularly applicable to projects financed through the RRP. The first draft bill was vetoed by the Portuguese Republic's President last December and an amended version is being discussed in Parliament and shall be submitted soon.

4. Public procurement framework and legal tendering

Expected changes in RRP special public procurement rules



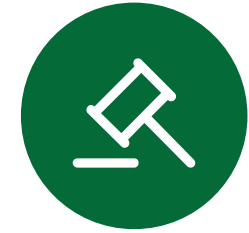
Quicker procedures (shortened deadlines for submitting proposals, prior hearings, administrative challenge etc.)



Less demanding on the financial capability and standing with tax and social security authorities of bidders



Performance bond may not be required



All contracts necessarily subject to the court of Auditors for review



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