

Call for tender for subcontracting expertise¹
EU Social Partners' Project on "The European Social Fund: Supporting Social Dialogue at National, Regional and Local Levels"

Date of publication on the websites of BusinessEurope, CEEP, UEAPME, ETUC:	14 October 2016
Deadline to respond:	23 November 2016

1. BACKGROUND	2
1.1 Introduction.....	2
1.2 Project Description	2
1.3 Objectives	2
1.4 Method	3
1.5 Activities	4
1.6 Organisation	6
1.7 Description of project partnership	6
2. PURPOSE OF THE TENDER	6
3. TASKS TO BE PERFORMED BY THE SUBCONTRACTOR.....	6
4. EXPERTISE AND EXPERIENCE REQUIRED	8
5. TIME SCHEDULE AND REPORTING.....	8
6. PAYMENT.....	9
7. SELECTION CRITERIA.....	9
8. FORM, STRUCTURE AND CONTENT OF THE TENDER	9
9. AWARD CRITERIA.....	10
10. CONTENT AND SELECTION OF THE BIDS	10

¹ Under reserve of acceptance of the project by the European Commission

1. BACKGROUND

1.1 Introduction

EU cross-sectoral social partners (BusinessEurope, CEEP, UEAPME and ETUC) have undertaken as part of the upcoming Integrated Projects of the EU social dialogue 2016-2018 to conduct a project on the ESF supporting social dialogue at national, regional and local levels.

This project will be supported by funding from the European Commission. An official decision by the European Commission on the allocation of funds is expected in November 2016. If and once this is confirmed the project activities and subcontracted experts contract would commence in December 2016.

In the framework of this call, EU cross-sectoral social partners express their intention to select a subcontractor to carry out the 24-month activity entitled:

“The European Social Fund: Supporting Social Dialogue at National, Regional and Local Levels”

1.2 Project Description

Recent EU cross-industry social partners’ capacity building activities have made it clear that in order to be able to develop their role as social partners and enhance social dialogue, some national social partner organisations need both technical and financial support to strengthen their capacity to act as social partners both at EU and national levels.

EU and national social partners have underlined these concerns in the ESF Committee as well as in several instances such as their previous capacity-building activities as part of integrated projects, notably a seminar on the ESF and capacity building held in Riga in March 2015. More recently this has been in the thematic group discussions as part of the follow-up to the 5 March conference on “a new start for social dialogue”.

A better use of the European Social Fund can be essential to support the existence of well-structured bipartite social dialogue at all appropriate levels in the EU Member States, especially at local and regional levels. It can also play an important role to achieve better implementation of EU social dialogue outcomes.

1.3 Objectives

With this project the European social partners aim to take stock of the current practice in terms of ESF support to social partners’ capacity-building, and compare this with social partners’ needs. In this view, the subcontractor’s role is to gather the information that social partners need, and to identify examples of national circumstances that sufficiently engage social partners in ESF programming, so as to enable them to come up with concrete recommendations on how to improve ESF support to social partners’ capacity building in view of the next ESF programming period, i.e. after 2020.

This project will have the following main goals:

1. To build on the implementation of the partnership principle and the role of social partners in the delivery and monitoring of ESF activities by mapping the ESF support to capacity-building of social partners.
2. To explore the extent to which capacity building facilitates, or the contribution that it could make in the future to, social dialogue and the implementation of EU social dialogue instruments in convergence and transition regions;
3. To gather and exchange information on practical examples of projects funded by the ESF at national, regional, and local levels.

To help partners to carry out these activities, an expert will be subcontracted and will be selected jointly based on the present call for tender.

1.4 Method

1. First phase: survey and phone interviews and preparation of a report of findings

This first stage of this project would involve desk research, as well as a survey and phone interviews addressed to social partners and all relevant stakeholders with a focus on convergence and transition regions in order to:

- Map out how ESF funds are being used for capacity building of social partners;
- Identify the level of involvement of social partners in the ESF monitoring committees, particularly concerning the monitoring and implementation of ESF funds;
- Identify some practical examples where the ESF is being used for capacity-building of social partners, i.e. where the ESF plays a positive role and where there are unmet needs of social partner organisations;
- Document, where appropriate, other existing vehicles at global, EU and national levels to support the capacity-building of social partners organisations;

The subcontracted expert, in close coordination with the steering committee, will then prepare a summary report outlining the main findings from the research, survey and phone interviews. This report will feed into the preparation of the cluster seminars.

2. Second phase: Cluster seminars

The second stage is made up of two cluster seminars taking place in Prague and Rome. Participants at the cluster seminars will be representatives from social partner organisations as well as regional and national managing authorities. These cluster seminars will encourage social partners to discuss their involvement in the delivery and management of ESF activities, as well as identify how the ESF facilitates capacity building to support social dialogue. The cluster seminars will also enable social partners, along with managing authorities, to identify future capacity building activities in the context of the ESF.

There will be a particular focus on convergence² and transition³ regions with the final selection of countries determined by the steering committee in consultation with the subcontracted expert at the first steering committee meeting.

3. Third phase: final conference and final report

Based on the outcome of the seminars, the subcontractor, in close collaboration with the steering committee, will prepare a final report that will be presented at a final conference in Brussels (provisionally foreseen for February 2018). This conference will bring together the project partners and their relevant national affiliates and stakeholders, as well as representatives from managing authorities.

1.5 Activities

Steering committee meeting #1

The steering committee would be composed of representatives from the secretariats of the EU cross-sectoral social partners. The first meeting would be in December 2016. During this meeting, the steering committee and the subcontractor will agree the details for the preparatory phase of the project and determine the dates and target countries of the cluster seminars and the final conference. It will also discuss a provisional structure for the cluster seminars.

The project organisers, with input from the subcontractor, will be responsible for preparing a draft agenda for each meeting of the steering committee. The subcontractor will prepare a summary of conclusions in coordination with the steering committee.

Research – survey and phone interviews

The subcontractor will conduct a survey and phone interviews, supported by relevant desk research, in order to:

- map out how ESF funds are being used for capacity building of social partners;
- Identify the level of involvement of social partners in the ESF monitoring committees, particularly concerning the monitoring and implementation of ESF funds;
- Identify some practical examples where the ESF is being used for capacity-building of social partners, i.e. where the ESF plays a positive role and where there are unmet needs of social partner organisations;
- Document, where appropriate, other existing vehicles at global, EU and national levels to support the capacity-building of social partners organisations;

Following these research activities, the subcontractor will prepare a summary report of findings which will feed into the preparation of the cluster seminars.

² Those regions where GDP per capita is less than 75% of the EU average – namely regions in Bulgaria, Croatia, Czech Republic, Estonia, France, Greece, Hungary, Italy, Latvia, Lithuania, Romania, Poland, Portugal, Slovakia, Slovenia, Spain, UK

³ Those regions where GDP per head GDP per capita is between 75% and 90% of the EU average – namely regions in Austria, Belgium, Denmark, France, Germany, Greece, Italy, Malta, Poland, Portugal, Spain, UK

Steering committee meeting #2

The second steering committee will take place after the first cluster seminar (provisionally in September 2017) to review the progress of the project, including reviewing the first cluster seminar, updating the survey where required, and preparing the future project activities.

2 Cluster Seminars

- 2 two-day cluster seminars
- Cluster seminars would have up to 60 participants (20 trade unions/20 employers/10 managing authorities/10 secretariats).
- Date: March 2017 – October 2017.
- The subcontractor and/or a member of his/her team will also attend the cluster seminars, present an overview of research findings at the seminar and provide moderation.
- For each cluster seminar the subcontractor will prepare a summary of discussions held in coordination with the steering committee.

Steering #3

A third steering committee meeting will take place after the second cluster seminar and in advance of the final conference. The aim of this meeting will be to review the outcomes of the cluster seminars, review the draft final report, and to prepare the final conference.

Final Conference

- +/- 120 participants;
- 100 national social partners (50 trade unions, 50 employers)
- Up to 10 representatives from regional and national managing authorities
- Up to 10 EU secretariats and expert
- Venue: Brussels
- Dates: February 2018 (indicative)

During the final conference final report will be presented.

Provisional Calendar of activities	
2016	
September	Launch of Call for Tender
November	Selection of subcontracted expert
December	Kick-off Steering Committee Meeting #1 with subcontracted expert
2017	
January - March	Research, survey and phone interviews and preparation of summary report
March - October 2017	Cluster seminars
September	Steering Committee Meeting #2 with subcontracted expert
December	Steering Committee Meeting #3 with subcontracted expert
2018	
February	European social partners' joint conference

1.6 Organisation

For the implementation of this project, an expert will be contracted for the following work:

- The subcontractor will include in the bid a first outline of its proposed methodology, including with respect to the preparation of the survey and up to 50 phone interviews.
- The steering group will discuss and agree during its first meeting a proposal prepared by the subcontractor for conducting the initial research and the structure of the survey. As much as possible, this should include a mix of social partners' inputs from the national, sectoral, regional and local levels, as well as some inputs from the ESF managing authorities.
- The subcontractor is responsible for preparing the summary report following the survey and phone interviews, which will be the main deliverable from the first phase of the project. The subcontractor will also prepare a final report for presentation at a concluding conference in Brussels. This report will be prepared in coordination with the steering committee. A first draft of the report should be submitted at least two weeks before the third steering group meeting to allow for corrections, validation approval, and layout and printing in due course before the final conference. The final report should be +/- 50 pages.
- In constant liaison with the ETUC, the subcontractor will work under the control and supervision of a steering committee.

Please refer to the subcontractor terms of reference (Section 3 below) for a more detailed description of the experts' tasks and deliverables.

1.7 Description of project partnership

Management of this project is shared by the ETUC and BusinessEurope (on behalf of the EU employer organisations). The ETUC is responsible for the management of subcontracted expertise on behalf of the cross-sectoral social partners.

The partners will provide expertise for the project components, steering committee meetings and the EU-level conference in Brussels.

2. PURPOSE OF THE TENDER

The tender aims at finding a subcontractor to carry out the joint project of the European cross-sectoral social partner organisations entitled "The European Social Fund: Supporting Social Dialogue at National, Regional and Local Levels".

In order to ensure a large visibility for this tender, BusinessEurope, CEEP, UEAPME and the ETUC will publish the tender specifications on their websites; they will each keep the tender online for one month.

3. TASKS TO BE PERFORMED BY THE SUBCONTRACTOR

The subcontractor should provide the following services:

In the bid:

- to propose a first outline of its proposed methodology, including with respect to the preparation of the survey and up to 50 phone interviews.

For the first steering committee meeting, the tasks to be performed by the subcontractor are the following:

- to propose a methodology for the preparatory phase with the support of the European social partners' secretariats (preparation of survey, list of contacts for phone interviews).

For the research, survey and phone interviews the tasks to be performed by the subcontractor are the following:

- to map out how ESF funds are being used for capacity building of social partners;
- to identify the level of involvement of social partners in the ESF monitoring committees, particularly concerning the monitoring and implementation of ESF funds;
- to identify some practical examples where the ESF is being used for capacity-building of social partners;
- to prepare a summary report (maximum 10 pages) based on the results of the survey and interviews. This summary report will be updated over the duration of the project to reflect responses to the survey, and in parallel the findings of the interviews.

For the cluster seminars the tasks to be performed by the subcontractor are the following:

- to present the findings from the survey and phone interviews;
- to moderate some workshops where needed;
- to prepare a summary of the discussions held at the seminar.

For the second steering group meeting the tasks to be performed by the subcontractor are the following:

- to evaluate the first cluster seminar and provide input on the preparation of the second cluster seminar;
- to discuss the preparation of the final report – structure and content.

For the third steering group meeting the tasks to be performed by the subcontractor are the following:

- to evaluate the activities to date;
- to discuss the preparation of the final conference;
- to take on board the steering group members' comments on the draft final report and send on this basis a final draft rapidly after the third steering group meeting.

For the final conference the tasks to be performed by the subcontractor are the following:

- Participate in the conference to present the draft final report (which is to be updated with the inputs and contributions of the final conference). The subcontractor will also provide moderation where necessary at the conference.

For the final report the tasks to be performed by the subcontractor are the following:

- to prepare the draft report (+/- 50 pages), which should make use of the findings of the survey, phone interviews and discussions at the cluster seminars and at the final conference, to draw together some conclusions and recommendations on how to improve the use of the ESF for capacity building activities which support social dialogue, as well as how to improve the involvement of social partners in ESF monitoring committees, particularly concerning the monitoring and implementation of ESF funds;
- to ensure that the final report is user friendly and in line with the overall objective of the project.

4. EXPERTISE AND EXPERIENCE REQUIRED

Expertise required:

- Knowledge of EU social dialogue and national industrial relations practices;
- Knowledge of the functioning of European Structural and Investment funds, with a particular focus on the ESF;
- Experience in working with social partners at European and national levels;
- Successful track record in working on European level projects.

Skills required:

- Proven ability to carry out in-depth research on EU issues and understanding links between European and national levels;
- Proven research skills, including identifying stakeholders and conducting interviews;
- High proficiency in English: ability to draft documents and make presentations in English
- Ability to work within specified deadlines and to respect budgetary limits

5. TIME SCHEDULE AND REPORTING

The subcontractor will be asked to work from 01/12/2016 (if the first steering committee is in December) or 01/01/2017 to 30/11/2018.

The subcontractor will be responsible for remitting the deliverables foreseen in the project methodology within the above time frame.

6. PAYMENT

The total maximum budget available for the fees of the subcontractor is as follows:

Contract with ETUC	
Main activities and Meetings	
<ul style="list-style-type: none">▪ Desk research, survey and phone interviews▪ Drafting summary report▪ Participating in the steering group meetings (3), in the cluster seminars (2) and in the final conference▪ Drafting final report	
Total budget for the Expertise	€
	39.000 € (all taxes included)

The subcontractor will be remunerated in various instalments (advance and final payment). This amount does not include the travel and subsistence costs incurred for attending project meetings. These costs will be covered by ETUC on the basis of EU rules & thresholds.

7. SELECTION CRITERIA

The offers will be examined against the following criteria:

- Verifiable expertise, experience and skills, as required and described above;
- Proven track record of ensuring the quality of written materials produced, both in terms of content and format (i.e. previous publications), in the relevant subjects specified in this call for tenders;
- Price not exceeding the amount stated above;
- Previous research/work undertaken in the field European funds, in particular the ESF, taking into account employers and workers' needs.

8. FORM, STRUCTURE AND CONTENT OF THE TENDER

Tenders must be written in English. They must be signed by the tenderer or his duly authorised representative and be perfectly legible so that there can be no doubt as to words and figures. Tenders must be clear and concise and assembled in a coherent fashion.

Since tenderers will be judged on the content of their written bids, they must make it clear that they are able to meet the requirements of the specifications.

All tenders must include at least two sections:

i) Technical proposal

The technical proposal must provide all the information needed for the purpose of awarding the contract, including:

- Specific information covering the technical and professional capacity, as required, in particular:
 - Description of relevant professional experience with emphasis on the specific fields covered by the invitation to tender;
 - Detailed curriculum vitae of key coordinator and/or possible other team members;
 - A selection of the main works and/or articles published by all the experts involved, in relation to the relevant subjects specified in this tender.
- Specific information concerning the proposed methodology for delivering the tasks listed in part 3.

ii) Financial proposal

Prices of the financial proposal must be quoted in euros, including if the sub-contractor is based in a country which is not in the euro-area. As far as the tenderers of those countries are concerned, they cannot change the amount of the bid because of the evolution of the exchange rate. The tenderers choose the exchange rate and assume all risks or opportunities relating to the rate fluctuation.

The maximum amount available for this contract is EUR 39,000 (all taxes included).

Prices shall be fixed and not subject to revision during the performance of the contract.

9. AWARD CRITERIA

The contract will be awarded to the tender offering the best value for money, taking into account the specific objectives, requirements and selection criteria of the tender. The principles of transparency and equal treatment will be respected with a view to avoiding any conflicts of interest

10. CONTENT AND SELECTION OF THE BIDS

Offers must be received within 40 days of the date of publication of this call for tender by the ETUC, i.e. by 23 November 2016. Offers must be sent to the ETUC in both formats: electronic (by e-mail to amartin@etuc.org) and as a paper copy (see contact details below).

To ensure confidentiality, **bidders must submit their offer in a sealed envelope and the inside envelope shall not only bear the name of the department for which it is intended (see below), but also the words "Tender – not to be opened by the Mail Department" (Appel d'offre – à ne pas ouvrir par le service du courrier)**. If self-adhesive envelopes are used, they must be sealed with adhesive tape crossed by the signature of the sender.

A committee will be formed comprising representatives of the four European cross-sectoral social partners (BusinessEurope, CEEP, UEAPME and ETUC). One or more members of this committee will initial the documents, confirming the date and time of each bid. The committee members will sign the

report on the bids received, which will list the admissible bids and provide reasons for rejecting bids owing to their failure to comply with the stipulations of the tendering process.

This committee will also evaluate the tenders that have been deemed admissible. An evaluation report and classification of participation requests will be drawn up, dated and signed by all the members of the evaluation committee and kept for future reference.

This report will include:

1. The name and address of the contracting authority, the purpose and value of the contract or framework contract;
2. The names of any excluded candidates and the reasons for their rejection;
3. The names of candidates selected for consideration and the justification for their selection;
4. The selected candidate and justification of this choice in terms of the selection or award criteria.

The contracting authorities will then make their decision.

All candidates must either deliver their bid by hand or submit them by registered letter to:

<p>ETUC</p> <p>Liina Carr</p> <p>Confederal Secretary</p> <p>International Trade Union House</p> <p>Boulevard du Roi Albert II, 5</p> <p>B – 1210 Brussels</p> <p>BELGIUM</p>
--

For requests sent by registered mail, the postmark will serve as proof of the date of dispatch.
