

Tender specifications for subcontracting external expertise¹

EU SOCIAL PARTNERS' PROJECT ON SKILLS AND INNOVATION

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

1. BACKGROUND

1.1 Introduction

EU cross-sectoral social partners (BusinessEurope, CEEP, SMEUnited and ETUC) have decided, as part of the upcoming Integrated Projects of the EU social dialogue 2020-2021, to conduct a project on skills, innovation and provision of, and access to, training.

This project will be supported by funding from the European Commission. The project activities and subcontracted experts' contract would commence in March 2020.

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:

“Skills, innovation and training”

The tender specifications included in this document detail the background, tasks, price, and selection criteria and procedures regarding the subcontractor.

1.2 Project description

The European social partners have previously underlined the importance of innovation, skills, provision of, and access to, training as key factors in fostering productive enterprises and in creating and retaining jobs. Underpinning the need for action in this area are a number of labour market changes and trends that all EU member states are facing. Among these are the industry 4.0 revolution, digitalisation, social, demographic and environmental transitions, skill mismatches and global challenges. This includes the impact of “game changing technologies” (advanced industrial robotics, additive manufacturing, industrial internet of things, electric vehicles and industrial biotechnology) on how enterprises function and the role that training and its provision can play in adapting to and utilising these new technologies.

To respond to these changes enterprises need to innovate and a key component of this is having an appropriately skilled workforce. Skills are a key asset for fostering innovation. Therefore, the provision of, and access to, training that responds to employers' and workers' needs for developing innovative technologies and business models and that enables workers to find and maintain jobs in line with their skills, expectations and competences is vital.

Cedefop's European skills and jobs survey has revealed that about 30% of European employees possess qualifications that are not well-matched to those required by their jobs, while about 45% of EU adult workers believe that their skills can be better developed or utilised at work. In addition, Cedefop's Skills forecast – Trends and challenges to 2030 (2018) highlights that in the future the jobs tasks will be shifted to more autonomy, less routine, more ICT, fewer physical tasks and more social and intellectual tasks over the forecast period to 2030.

EU research and development (R&D) intensity is much lower in the EU (2.0% in 2016) than in Japan (3.2%) and the USA (2.7%) and is also reflected in the low number of patent applications. China significantly increased its share of spending over the last decade (from 1.4% to 2.1%) and has also overtaken the EU. According to Eurostat, just under half (49%) of enterprises in the EU are classed as innovative, which shows that further efforts are needed if enterprises are to remain competitive and create jobs.

Eurofound has identified that innovation – changes in products, processes and in other aspects of their businesses – can help enterprises adapt to changing circumstances, add value and become more competitive, increasing their job creation potential. Furthermore, human resources and work organisation practices need to be reviewed in relation to changing needs in sectors and enterprises in order to create the right work environment to support innovation and approaches to long-term skills strategies, and the provision of and access to training, cooperation between workers and employers, and employee involvement in problem-solving, employee-led innovation and access to external ideas.

Enterprises, therefore, need policies and initiatives to better match demands driven by technological, demographic, environmental, and economic changes and set up sustainable innovation-oriented skills strategies in collaboration with trade unions on provision of skills needs of employees on transversal skills, basic skills, STEM (science, technology, engineering and mathematics) skills, and “soft” skills (e.g. multicultural openness), leadership/managerial and entrepreneurial skills and creativity, innovativeness, interpersonal, linguistic, teamwork, communication and design.

Social dialogue and collective agreements also play an important role in the governance of innovation-oriented training systems, in creating training opportunities and in improving the relevance and provision of employee training, which are to be addressed in the project and in the final outcomes.

Taking these aspects into account, the project will focus on the following broad objectives:

- Innovation and its link to the long-term skills strategy development of enterprises to meet changes;
- The nature and extent of cooperation between enterprises, social partners, education and training providers and organisations that aim to foster research and innovation, with a focus on how to organise partnerships effectively so as to improve access to high quality and innovative employee training and to improve the relevance and updating of curricula ;
- The different ways in which countries and enterprises provide and foster access to training, including through new approaches, such as digital learning, training entitlements, and the effectiveness of training in responding the changing needs of employers and workers;
- The changing nature of work and training content in view of new trends and developments – the need to combine technical and soft skills.

The project activities will build on a fact-finding seminar in June 2019 and, amongst others, upon their joint work in the framework of actions for the lifelong development of competencies and qualifications and the 2017-2018 project on promoting social partnership in employee training.

The project will bring together the European Social Partners and their member organisations. It will also dialogue with a wider range of relevant EU level organisations that are active in this area, including EU sectoral organisations.

Representatives from relevant stakeholders may be invited to contribute to the seminars and final conference where relevant.

1.3 Objective

The aim is to identify different approaches to innovation, skills, provision of and access to training and to produce a final report and policy recommendations using the outcome of the mapping study, the survey and interview outcomes, and 3 thematic seminars to identify

a number of positive examples of integrated approaches to innovation, skills, provision of and access to training which could be promoted at EU level. The project will be closed by a joint conference at the end of the project to discuss main findings, disseminate report, and discuss possible following steps.

The 3 thematic seminars will be structured around the following themes:

- Provision of and access to training to support innovation: The role of social partners and collective bargaining
- Game changing technologies and innovative approaches to the identification of new skills
- Financial incentives for research and development and skills investments

1.4 Method

1. First phase: background research and preparation of thematic reports

The first stage of the project would involve the development of a mapping study through desk research/surveys and gathering data on enterprises' approaches to innovation and training in order to be innovative and how their skills development strategies will provide for and foster access to training to address these needs. Based on a literature review, the contractor should characterize and quantify the scope of the 'fit-for-innovation' skills mismatch for enterprises at EU level.

The contractor will also conduct interviews among member organisations of social partners seeking good cases and practices **at enterprise, sectoral and national levels**, taking into account social partners' agreements on innovation, skills, provision of and access to training, including the effectiveness of employee training in meeting changing needs of employers and workers and how social dialogue and the participation of workers can contribute to the innovation process.

The desk research will be supported by telephone interviews with **sectoral or enterprise representatives** based on the recommendation of national and European social partners. Consideration will be given to addressing a short questionnaire² to national social partners.

Based on this input, the diversity of practice at national level will be documented, including a well-balanced mix of practices at **cross-industry, sectoral and enterprise level**. The link with existing regulations in this area will also be analysed.

There will be a travel fund available to allow the subcontracted expert to meet with relevant social partners organisations to conduct interviews and gather information, where appropriate.

The subcontracted expert, in close coordination with the steering committee, will then prepare a short **report for each sub-theme**. These reports will be used as a basis for discussions at the three thematic seminars and will be summarised and published together with the summary of the seminars on the employers and trade union resource centres.

What is important is to get the views of the social partners on the system and their satisfaction level as regards its performance to respond to changing skills needs in relation to improved innovation outcomes from the perspective of the role of social partners and social dialogue, financing, access, and inclusiveness of employee training.

² **Questions to be developed at the first meeting of the steering committee together with the researcher**

2. Second phase: thematic seminars

The second stage will involve a series of three thematic seminars that would be organised. The seminars would focus on existing examples of (good) practices. The general format of the seminars would be developed by the steering committee and would include a focus on practices in specified countries (around five countries) and at cross-industry, sectoral and company level.

The thematic seminars will enable the social partners to **discuss thematic reports** and to identify challenges and solutions which are relevant to their national context. The subcontractor and/or a member of his/her team, will attend the thematic seminars and have the possibility to go one day in advance of the seminars for meetings with relevant stakeholders in preparation for thematic seminars discussions. This is to be determined in consultation with the project organisers.

3. Third phase: final conference and final report

Based on the outcome of the mapping study and desk research and of the seminars, the subcontractor, in close collaboration with the steering committee, will prepare a **final report (maximum 50 pages)** that will be presented at a final conference in Brussels (provisionally foreseen for October 2021). This conference will bring together the project partners and their relevant national affiliates and stakeholders.

Building on this project, the objective will be to foster social dialogue around skills and innovation, taking into account the diversity of industrial relations practices at national level.

1.5 Activities

A short description of the main features of the project follows:

Steering committee meeting #1

- The steering committee would be composed of representatives from the secretariats of the EU cross-sectoral social partners and the subcontractor.
- The first meeting would be in March 2020. During this meeting, the steering committee will agree the details for the preparatory phase of the project and determine the dates of the thematic seminars and the final conference. Exact focus and potential good cases to be presented in the seminars in relation to each theme will be identified by the answers to the survey among the member organisations of the European social partners. The steering committee will also discuss the questions under each theme and a provisional structure for the thematic 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 and preparation of country reports

The subcontractor will:

- Conduct desk research and a mapping study, including with the support of **interviews/questionnaires**, to gather data on enterprises' and trade unions' approaches to skills provision, innovation and training in order to be innovative

and how their skills development strategies will provide for and foster access to training to address these needs.

- Explore training, as well as the different roles played by social partners at national, regional, sectoral and enterprise levels, and where appropriate, the role of employment services.
- Collect examples of good and less successful practices. The aim would be to include practices from selected countries/sectors/companies for each theme, including at least two from the enterprise level.
- Prepare the thematic reports including descriptive elements related to the desk research and mapping, and the examples of good practices for inspiration, and of less successful practices based on which learning can be drawn.

Steering committee meeting #2

- A second meeting of the steering committee will take place in October 2020 to take stock of the project to date, including a review of the first thematic seminar to determine if the format for the seminars should be adapted, and to plan the remaining seminars.

Three thematic seminars

- 3 two-day seminars
- Seminars would have up to 50 participants (20 trade unions/20 employers/12 secretariats).
- Date: June 2020 – June 2021.
- The subcontractor and/or a member of his/her team will also attend thematic seminars, present an overview of research findings at the seminar and provide moderation.
- For each thematic seminar the subcontractor will prepare a summary of discussions held in coordination with the steering committee.

Steering committee meeting #3

- A steering committee meeting will take place in July 2021, to discuss the outcomes of the 3 thematic seminars, the draft final report, and to prepare the final conference - foreseen for October 2021.

Final one-day conference in Brussels

- +/- 120 participants from target and other EU countries.
- Date: October 2021.
- Languages: 5 languages will be available for interpretation (EN + 4 others TBC).

Provisional Calendar of activities	
2020	
20 January	Launch of Call for Tender
28 February	Selection of subcontracted expert
March	Kick-off Steering Committee Meeting #1 with subcontracted expert
March – June	Research for preparation of thematic reports conducted by subcontracted experts
June – June 2021	Thematic seminars in target countries
October	Steering Committee Meeting #2 with subcontracted expert
2021	

July	Steering Committee Meeting #3 with subcontracted expert
October	European social partners' joint conference

1.6 Organisation

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

- He/she will make as part of the bid an initial proposal on how to conduct the initial research (main sources and data), and prepare a short concept note regarding the methodology for the preparation of the thematic report. The steering committee will discuss both aspects with a view to agreeing rapidly at the beginning of the project on the structure of the thematic reports.
- He/she is responsible for preparing 3 thematic reports, which will be the main deliverable from the first phase of the project. Following the respective thematic seminars and the comments made at these events he/she will update the thematic reports. He/she 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 in time for discussion at the 3rd Steering Committee meeting to allow for corrections, validation approval, with the final report being finalised 6 weeks before the date of the final conference to allow for translation, and layout and printing. The final report should be +/- 50 pages.
- In constant liaison with BusinessEurope, he/she 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). BusinessEurope 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 "*Skills, Innovation, provision of, and access to, training*".

In order to ensure a large visibility for this tender, BusinessEurope, CEEP, SMEunited 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 for the applicant organisations:

For the kick-off steering committee meeting, the tasks to be performed by the subcontractor are the following:

- to propose a methodology for the preparatory phase (gathering data on enterprises' approaches to innovation and training as well as the different roles played by the social partners at national, sectoral and enterprise level), coherent with the description of the project and its aims (above);
- to present a preliminary draft of the structure of the thematic reports (**1-2 pages**).

For the background research and preparation of the thematic reports, the tasks to be performed by the subcontractor are the following:

- Desk research and mapping study gathering data on national, sectoral and enterprises' approaches to innovation and training in order to improve innovation outcomes, as well as the role of social partners;
- Analysing the answers to the questionnaire among member organisations of the European social partners and suggesting best examples accordingly, and based on desk research
- Collect examples of best practices (and less successful practices, where relevant). The reports should aim to include practices from country/sector/company levels selected per theme. The total length of the reports should be up to 20 pages;
- The thematic reports are to be considered a work in progress as they may need to be revised by the subcontractor following the discussions at the thematic seminars;
- The subcontractor will have at his/her disposal the possibility to undertake funded visits to **selected countries** (up to 15 visits) to organise face-to-face meetings with social partners, including sectoral and company level, to complement desk research and mapping study if and as required. These visits are part of the 50 days allocated to the subcontractor for the preparatory phase of the project, including proposing the methodology, initial desk research, conducting interviews and face-to face meetings with national stakeholders, drafting 3 thematic reports (+/- 20 pages);
- A bibliography of literature and technical documents used and reviewed should be appended to the country reports.

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

- to present the results of the preparatory phase and key issues identified in relation with the thematic report(s).
- To give his/her views on the content and outcome of the first thematic seminar and to advise on the issues that could be addressed in the remaining seminars taking into account the content of the country reports.

For each of the three thematic seminars the tasks to be performed by the subcontractor are the following:

- to present the thematic reports, and moderate the seminar / workshop discussions, in agreement with the European social partners;
- to prepare a short-written summary of the discussions held at the seminar;

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

- To evaluate the series of thematic seminars and to advise on final adaptations to the thematic reports;
- to present the draft final report, and a proposal on key social partner practices to be highlighted during the final conference.

For the final conference the subcontractor will participate in the conference to present the final report.

For the final report, for which the subcontractor will have 20 days to prepare, the tasks of the subcontractor are the following:

- to prepare the draft report (+/- 50 pages), which should make use of the findings of thematic reports and discussions at the thematic seminars to draw together some conclusions and recommendations on how to improve the different training systems and ensure inclusive, quality and effective skills provision and long-term skills strategies as a way to foster innovation and in order to encourage better innovation outcomes through the engagement of social partners;
- to ensure that the final report is user friendly and in line with the overall objective of the project.

Travel Fund

The subcontractor and his/her team will have the possibility to travel to the target countries for background interviews with relevant stakeholders. This fund will allow travel for 3 persons for up to 1 day at a time for up to 15 visits. Which countries would need to be visited would be at the discretion of the subcontractor.

4. EXPERTISE AND EXPERIENCE REQUIRED

Subcontractor

Sound experience is required in the following areas:

- Good knowledge and understanding of the training systems, policies and practices, in particular for continuous training including workplace training, at European, national, regional and sectoral levels;
- Deep understanding of policies, strategies and approaches in the field of research and innovation at EU, national and enterprise levels;
- Demonstrated experience and expertise in developing comparative analyses on labour markets / skills development issues;
- Experience in working with social partners at European and national levels;
- Successful track record in delivering research-based European level projects.

Following skills are also 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 relevant stakeholders beyond the social partners, and conducting interviews;
- High proficiency in English: ability to draft documents and make presentations in English. Knowledge of other languages is a plus;
- Ability to work within specified deadlines and to respect budgetary limits.

The bidder must specify in his/her application whether he/she will work alone or with a team and how many people are in the team. He/she must also send their CV as well as those of any team members.

5. TIME SCHEDULE AND REPORTING

The subcontractor will be asked to work from 01/03/2020 to 30/11/2021.

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

Travel and subsistence costs as part of this project will be reimbursed to the subcontractor, in accordance with BusinessEurope internal rules on project management.

6. PAYMENT

The total maximum budget available for expertise is as follows:

Contract with BusinessEurope	
➤ Steering Committee meeting # 1 ➤ Preparatory phase, background (mapping study) and desk research ➤ A survey, interviews and documentary analysis ➤ First thematic seminar ➤ Steering Committee meeting # 2 ➤ Thematic seminar 2 ➤ Thematic seminar 3 ➤ Steering Committee meeting # 3 ➤ Preparation final report ➤ Final conference	
Total budget for the Expertise	€
	59,640
TOTAL € 59,640	

In accordance with the above table, the subcontractor will enter into a contract with BusinessEurope for a maximum total of € 59,640 (**all taxes included**).

Upon invoice the subcontractor will receive an advance, interim and final payment.

7. PRICE

Contract with BusinessEurope: € 59,640

TOTAL: € 59,640

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 59,640 (all taxes included).

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

9. 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;
- Initial proposal on how to conduct the initial research (main sources and data), and short concept note regarding the methodology for the preparation of the country reports;
- Price not exceeding the amount stated above;
- Previous research/work undertaken in the field education and innovation;

10. 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.

11. CONTENT AND SELECTION OF THE BIDS

Offers must be received before the deadline of this call for tender by BusinessEurope, i.e. by 28 February 2020. Offers must be sent to BusinessEurope (see contact address 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 four representatives of the European cross-sectoral social partners (BusinessEurope, CEEP, SMEunited 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. In case of multiple admissible bids, 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 names of candidates put forward and justification of their 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:

BusinessEurope Rebekah Smith Deputy-Director, Social Affairs Department Avenue de Cortenbergh 168 B – 1000 Brussels Belgium

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