

Tender specifications for subcontracting external expertise

EU SOCIAL PARTNERS' PROJECT ON CIRCULAR ECONOMY

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1. BACKGROUND

1.1 Introduction

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

This project will be supported by funding from the European Commission. The project activities and subcontracted experts' contract will start 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: "*Circular Economy*".

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

1.2 Context

The circular economy has become a prominent theme on the European political agenda over the last few years and there is a growing awareness of the broad concept of circular economy amongst businesses, policy makers, and workers and citizens.

As highlighted in the European social partners work programme 2019-2021, moving towards a circular economy is a key requirement for decarbonising the European economy as well as to ensure the EU's prosperity in a world where the competition to access natural resources will become more challenging. To do this effectively will require changes in the technology used in many industrial processes, where adjustments will differ from one sector to another. Whilst the transition to a circular economy is certainly not an easy one, there is a large willingness amongst businesses to do so.

At the same time, it is crucial to foster a better understanding and raise awareness of the opportunities and challenges related to the transition to the circular economy. One key issue is how this transition is impacting on labour markets now and in the future. This issue

has been deeply analysed in various reports but in a rather theoretical way¹. What is missing is concrete experience on how social partners at national level are dealing with these impacts and try to anticipate future developments.

1.3 Objectives of the project

The project has the following objectives:

- Building on the existing literature and on three cluster seminars, this project aims to fill the gap, by analysing, through first-hand experience, the impact of the transition to the circular economy on creation of jobs, on changing jobs and tasks and on working conditions, both from the point of view of employers and workers. It will evaluate the impacts in the last years, as well as undertake a forecasting/analysis of expectations for the coming years.
- It will also analyse the ways to respond to the changes and deal with the challenges of the transition in terms of skills updating, re-skilling and training of workers, and ensuring that, when people enter the labour market, they have the appropriate skills to take up the new job opportunities.
- The project will also analyse the change in the organisation of work that the shift to a circular economy triggers and the impact of circular economy on potential occupational health and safety risks, changing in working conditions and opportunities for improvements.
- The project will also consider a key issue to further develop the circular economy, which is by creating a functioning market for secondary raw materials in Europe. Also, given that raising awareness and understanding of citizens and consumers are key in achieving this, the dissemination and communication of the results of the project will aim at addressing these groups.
- Since the circular economy is a broad concept, the aim will be to focus on activities which are the most relevant in terms of labour market impacts (for example because they are labour intensive or have a large potential for new or changing jobs or are exposed to specific risks). These activities are to be selected in all phases of the circle.

1.4 Methodology

Step 1 – Launch of a survey

The Expert selected after this call of tender will conduct a survey with national/sectoral employer and trade union member federations and companies (management and worker representative) to get views on how the circular economy transition is impacting on their national labour market and on working conditions, including occupational health and safety. The survey will also aim to collect examples of good practices by social partners, companies and examples of effective public policies. The expert will prepare the questions of the survey together with the social partners, will collect the various answers and will analyse the results. The work will be based on desk research and selected country visits. Travel fund will be made available in this regard.

¹ “Impacts of circular economy policies on the labour market: Final report”, Cambridge Econometrics, Trinomics, and ICF, 2018 <https://www.camecon.com/wp-content/uploads/2019/01/Circular-Economy-DG-Env-final-report.pdf>

Step 2 – Organisation of three cluster seminars

In parallel to that survey, the European Social Partners will organise three national joint cluster seminars including national sectoral federations, to discuss the impact of the circular economy transition on labour markets and working conditions, in their countries, to exchange good practices, including of effective public policies.

Before each seminar, the expert selected after this call of tender will prepare a short discussion paper presenting the countries specificities with regard to circular economy. These working documents will be used to feed the discussions during these seminars, together with the results of the survey if already available.

The subcontracted expert will participate to these seminars. Travel fund will be made available in that regard.

After each seminar, the subcontracted expert will produce a short report summarising the discussions.

The objective of these seminars will be to foster learning and understanding between countries and to raise awareness on circular economy amongst employers, workers and their representatives, and other relevant stakeholders. National cluster seminars could also include company visits.

The cluster seminars will cover the 12 following countries: Spain, Czech Republic, Finland, Denmark, Netherlands, Germany, France, Italy, Poland, Belgium, Slovenia and Greece.

Step 3 – Production of a final report

Based on the results of the survey, on desk-research made by the expert, and on the discussions of the cluster seminars, the expert selected after this call for tender will produce a final report summarising the key findings of this project.

The final report should:

- Provide a clear description of the concept of circular economy and the different jobs within it, taking into account different sectors.
- Identify which sectors and countries would be the most impacted by a shift to circular economy and which sectors would benefit the most from moving to circular economy, bearing in mind that for each sector it may depend more on the specific tasks/jobs.
- Identify the impacts that a shift to circular economy would have on employment (job gain and job losses) and on the labour market situation for the different sectors/countries.
- Identify the impacts that a shift to circular economy would have on working conditions, including health and safety.
- Identify the impacts that a shift to circular economy would have on skills and training needs in the different countries and sectors.
- Identify how Social Partners have been trying to deal with this issue so far – identification of best practices and challenges.

Step 4 – Organisation of a final conference

A joint final conference will be organised in Brussels at the end of the project (foreseen in October 2021). This final conference will:

- Present and discuss the main findings and disseminate the report.
- Present and collect concrete commitments from a “Coalition of the willing”, i.e. governments (national or local), businesses, trade unions and other interested stakeholder groups that are willing to work on implementing certain recommendations from the report.
- Discuss other possible following steps.

The outcomes of the project will be published on the respective resource centres of the trade unions and employers.

In between the different steps of the project, three steering group meetings will be held in Brussels. One steering group will be used to prepare the work of the experts in relation to the survey and to the outline of the final report. The second steering group will take place to prepare the cluster seminars and to review the progress of the final report. The final steering group meeting will take place in advance of the final conference to prepare it and to finalise the project report.

1.5 Activities

A short description of the foreseen project activities:

Steering committee meeting #1

- The steering committee will be composed of representatives from the secretariats of the EU cross-sectoral social partners and the subcontractor.
- During the first 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. The target countries for each theme will be identified by the European social partners in due time before the first steering meeting. The steering committee will also discuss a provisional structure for the thematic seminars as well as the content of the survey questionnaire that will be prepared by the subcontracted expert.
- 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.

Cluster Seminar 1 in Denmark

- **Countries concerned:** Denmark – Czech Republic – Germany - Belgium
- **Organisation:** 2-day meeting (Organised by BusinessEurope)
 - +/- 50 participants
 - 20 national social partners (20 trade unions, 20 employers)
 - Up to 12 EU secretariats, speakers, experts in each seminar
 - Place: Copenhagen
 - Dates: June 2020
 - Working languages: English + 3

Steering committee meeting #2

- A second meeting of the steering committee will take place 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.

Cluster Seminar 2 in Slovenia

- **Countries concerned:** Slovenia – Finland – Spain - Netherlands
- **Organisation:** 2-day meeting (Organised by ETUC)
 - +/- 50 participants
 - 20 national social partners (20 trade unions, 20 employers)
 - Up to 12 EU secretariats, speakers, experts in each seminar
 - Place: Ljubljana
 - Dates: October 2020
 - Working languages: English + 3

Cluster Seminar 3 in Italy

- **Countries concerned:** Italy – Poland – Greece - France
- **Organisation:** 2-day meeting (Organised by BusinessEurope)
 - +/- 50 participants
 - 20 national social partners (20 trade unions, 20 employers)
 - Up to 12 EU secretariats, speakers, experts in each seminar
 - Place: Rome
 - Dates: January 2021 TBC
 - Working languages: English + 3

Steering committee meeting #3

- A steering committee meeting will take place, 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

- **Countries concerned:** 33 countries, including all EU Member States and candidate countries (affiliates from EEA countries can attend the conference at their own cost)
- **Organisation:** 2-day meeting (organised by ETUC)
 - +/- 125 participants
 - 110 national social partners (55 trade unions, 55 employers)
 - Up to 15 EU secretariats, speakers and experts
 - Place: Brussels
 - Date: June 2021 (indicative)
 - Working languages: English + 4

Provisional Calendar of activities	
2020	
20 January	Launch of Call for Tender

03 March	Selection of subcontracted expert
31 March	Kick-off Steering Committee Meeting #1 with subcontracted expert
March – June	Launch of survey + preparation of discussion papers for cluster seminars
June – June 2021	Thematic seminars in target countries
...	Steering Committee Meeting #2 with subcontracted expert
2021	
...	Steering Committee Meeting #3 with subcontracted expert
October	European social partners' joint conference

1.6 Description of project partnership

Management of this project is shared by the ETUC and BusinessEurope (on behalf of the EU employer organisations). 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. TASKS TO BE PERFORMED BY THE SUBCONTRACTOR AND DELIVERABLES

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 survey, cluster seminars
- to present a preliminary draft of the structure of the final report

For the survey and preparation of cluster seminars, the tasks to be performed by the subcontractor are the following:

- Desk research and drafting of questions to be circulated to European cross-sectoral social partners' affiliates to take stock of experiences with Circular Economy, good practices, challenges etc.
- For each of the cluster seminars, propose some ideas for the themes to be tackled during the discussions, as well as possible concrete cases.
- For each of the cluster seminars, prepare a 10 page discussion paper/country report providing an overview of circular economy aspects in selected countries, providing background information on employment, working conditions, skills and training needs, sectors impacted and benefitting from a shift to circular economy.
- The subcontractor will have at his/her disposal the possibility to undertake funded visits to 10 targeted countries to organise face-to-face meetings with social partners to complement desk research and survey if and as required.
- A bibliography of literature and technical documents used and reviewed should be appended to the discussion papers.

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

- to present the results of the survey and key issues identified in relation with the discussion papers.
- 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 discussion paper, and moderate the seminar / workshop discussions, in agreement with the European social partners;
- to prepare a short-written summary report 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 survey results, desk research, the findings of country reports and discussions at the thematic seminars
- to ensure that the final report is user friendly and in line with the overall objective of the project.

3. EXPERTISE AND EXPERIENCE REQUIRED

Subcontractor

Sound experience is required in the following areas:

- Good knowledge and understanding of Circular Economy/ Sustainable development topics;
- Deep understanding of policies, strategies and approaches in the field of circular economy at EU, national and enterprise levels;
- Demonstrated experience and expertise in developing comparative analyses on labour markets/employment/working conditions 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.

4. 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 ETUC internal rules on project management.

5. PRICE & PAYMENT

The total maximum budget available for expertise is as follows:

Contract with ETUC	
<ul style="list-style-type: none">➤ Steering Committee meeting # 1➤ Preparatory phase, background 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	59,000 €

In accordance with the above table, the subcontractor will enter into a contract with the ETUC for a maximum total of € 59,000 (**all taxes included**).

Upon invoice the subcontractor will receive an advance (33%), interim (33%) and final (34%) payment.

In addition to that, the subcontractor and his/her team will have available a travel fund to allow them 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, to be decided with ETUC and BusinessEurope.

6. 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 59,000 (all taxes included).

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

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;
- 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;

8. 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.

9. CONTENT AND SELECTION OF THE BIDS

Offers must be received within 30 days of the date of publication of this call for tender by the EU Social Partners, i.e. by 28 February 2020. Offers must be sent to ETUC (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:

<p>European Trade Union Confederation Juliane Bir Head of trade union policy Boulevard Roi Albert II 5, 1000 Bruxelles Belgium</p>

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