

Call for tenders

Integrated Projects of the EU Social Dialogue 2019-10

Activities jointly managed – Part A: Tools to support the EU Social Dialogue development

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Deadline to respond	13 October 2019 <i>5pm Brussels time</i>

Tender specifications for subcontracting external expertise

Title: “Implementation of autonomous social dialogue instruments and supporting capacity-building of social partners organisations”

1. Introduction

The European social partners ETUC, BusinessEurope, CEEP and SMEunited have responded to a call for proposal of the European Commission – DG EMPLOYMENT, SOCIAL AFFAIRS & INCLUSION (budget heading 04.03.01.08 “Industrial relations and social dialogue”) to obtain the necessary funding in order to be able to carry out a number of actions.

The European Commission replied positively to the European social partners’ proposal and two contracts were signed in 2018, respectively with ETUC and BusinessEurope (on behalf of CEEP and SMEunited) to carry out the Integrated Projects of the EU Social Dialogue 2019-20 - Capacity Building and Ad-Hoc Social Dialogue Activities (hereby the “Integrated Projects”).

In the framework of the Integrated Projects, the European social partners express their intention to select two subcontractors. This call for tender describes the subcontracting work needed within a 11-month timeframe.

These specifications therefore detail the background, purpose of the tender, experience required, tasks, payment and price, selection criteria and procedures.

2. Background

During the IP 2014-2016 the European social partners engaged experts to conduct fact finding activities with national level social partners in countries where implementation has been observed to be lacking. This activity resulted in a report and underpinned much of the subgroup work during the first two-year mandate. In line with the outcomes of the multi-annual work programme of the European social partners, 2019-2021 and with the renewed mandate of the subgroup, the social partners will make use again of such expertise to reinforce the work of the subgroup.

In their recently agreed work programme for 2019-2021, the European social partners recognised that in order for the European social dialogue to have a positive impact much needs to be done to strengthen and support social dialogue at all levels and to enhance the capacity building of national social partners, where needed, to follow-up on European, and national, social dialogue outcomes.

This includes the need for closer and more intense interactions and linkages between the European and national levels of social partners.

As part of this, the European social partners are committed to step up their efforts in order to make further progress and take supportive actions to improve the implementation of their autonomous framework agreements, namely:

- Telework (2002)
- Work Related Stress (2004)
- Harassment and Violence at Work (2007)
- Inclusive Labour Markets (2010)
- Active Ageing and an Inter-generational Approach (2017)

This contract focuses on at least 9 countries where a lack of or weak implementation have been observed for one or more of the four autonomous framework agreements, and/or where social partners say they experience a lack of capacity-building support:

- Bulgaria
- Croatia
- Estonia
- Hungary
- Latvia
- Lithuania
- Poland
- Romania
- Slovakia

Building upon the work performed by experts during the previous mandate of the subgroup of the social dialogue committee, this process will identify the practical / structural / legal reasons explaining the developments in the countries concerned, and the capacity / organisational challenges and needs of these organisations. The aim is to find solutions at national level, including by supporting the national social partners of the nine countries concerned to define their capacity-building needs and present a summary of the challenges to be met and possible ways forward in their respective organisations, jointly as social partners, and with their national governments, e.g. to take steps to fully realise the commitments made in the quadripartite statement A New Start for Social Dialogue, such as obtaining a political commitment of their government to invest an appropriate amount of ESF resources for social partners capacity-building.

The budget is managed by the ETUC, on behalf of the four EU social partners' organisations.

This work will also provide a basis for a better understanding of the state of play of implementation of autonomous agreements in all Member States and feed into discussions during cluster seminars organised in the framework of the above-mentioned Integrated Projects.

3. Purpose of the tender

The tender aims at finding subcontracting expertise to carry out the joint activity of the European social partner organisations entitled **“Promoting social dialogue, supporting better implementation of EU social partners’ autonomous framework agreements, and strengthening capacities of social partner organisations”**.

Two experts (one representing trade unions, one representing employers) will be selected by the European social partners.

In order to ensure a large visibility for this tender, the partners will publish the tender specifications on their respective websites. They will each keep the tender online for 40 (forty) calendar days.

4. Methodology and tasks to be performed

The two experts will work together as a team and will keep each other respectively informed about their respective actions with a view to engaging an appropriate level of coordination. The European social partners will direct the activities of the experts.

The experts will perform the following task in accordance with a planned methodology and calendar:

Fact finding

Based on a contact list of the European social partners’ affiliates in the countries concerned, the subcontracted experts will organise phone exchanges and make phone appointments with the management of the respective employers and trade unions organisations.

The objective is to inform the EU social partners in greater detail about the situation in the countries covered concerning the implementation of the five autonomous framework agreements and as concerns any capacity building needs related to this and for enhancing the overall capacity of social partner organisations. This includes exploring the role of EU financial support to strengthen the capacity of national social partners to implement agreements and promote capacity building of social partners through existing instruments, such as the European social fund or the Commission’s social dialogue budget lines, or ideas of possible new dedicated instruments based on the observed needs of the national social partners surveyed, for example in relation with their work as part of the European semester.

Draft/Update country profiles

Using the work already undertaken by the experts during the first mandate of the sub-group, the subcontracted experts will update factual country profiles for each country concerned, structured around three main parts:

- Part 1: Situation in each country concerning the five autonomous agreements
- Part 2: Situation in each country concerning capacity building needs
- Part 3: Problems identified
- Part 4: Solutions envisaged

Maximum length of each country profile: 4 pages.

As basis for this work, the EU social partners:

- will contact their respective members in the 9 identified countries to ask their views, first on the current state of play of social dialogue at national level, second on their current level of involvement in the EU social dialogue, thirdly on the implementation of the autonomous agreements, and lastly on capacity building needs for a stronger social dialogue.

Travel fund

A fund is available for the two subcontracted experts to travel together with representatives of the EU social partners to up to 9 countries (9 x 2 days). These countries will be determined at a later stage, based on the first findings and recommendations of the experts.

During the country visits, the experts and the European social partners will meet, jointly and/or separately, the management of their respective affiliates to discuss possible ways of improving the implementation of autonomous framework agreements.

The country profiles will be updated according to the findings on the ground.

The use of the travel fund is subject to European Commission reimbursement rules. Travel and subsistence costs are reimbursed. The budget is managed by the ETUC, on behalf of the four EU social partners' organisations.

Expected outcomes

Based on the information received from the national level, including during the visits where appropriate, the subcontracted experts will finalise the country profiles and hand the final version to the European social partners.

The European social partners are committed to find possible ways to make further progress on the linkages between national and European social dialogue, improve the implementation of their autonomous framework agreements, and how the capacities of social partner organisations can be strengthened so as to help further the implementation of social dialogue outcomes, promote a stronger social dialogue and promote and support the autonomous role of social partners' in policy making at national and European level, including the European Semester process.

The solutions (part 4 of each country profile) proposed by the experts, will be evaluated and considered for further actions in the context of other meetings organised by the EU social partners (for example namely the Social Dialogue Committee, national capacity building seminars a possible joint conference on social dialogue).

5. Provisional calendar of the action

2019	
September	Launch of the call for tender and selection committee (choice of the experts)
21 October	“Kick off” (Brussels) in sub-group
October/January	Fact finding phase
2020	
February/March	First draft country profiles
March	Steering committee 2 (Brussels) (Sub-group/SDC) (tbc)
March/May	Country visits (where appropriate)

May/July	Final country profiles
September	Final discussion in sub-group/SDC

6. Link with other related activities

Apart from supporting the work of the subgroup, the final report and country profiles will feed into the process of monitoring and evaluating the implementation of autonomous framework agreements in the all EU Member States.

The final country profiles will also be useful in the ongoing work of the European social partners in identifying capacity building needs of social partners, enabling future Integrated Projects to better target activities which strengthen social dialogue and linking up potential funding sources such as the ESF, social dialogue budget lines etc.

7. Steering committee

This action will be managed by ETUC (on behalf of the four EU social partners organisations), under the supervision of a steering committee composed of representatives of ETUC, BusinessEurope, CEEP and SMEunited.

The European social partners will provide expertise to support an effective execution of the project and of the steering committee meetings organised in Brussels.

The European social partners will appoint two members of staff (one on the trade unions' side and one on the employers' side) who will serve as technical contact points and provide support or assistance in the overall process.

The steering committee will endorse the final report and country profiles.

8. Experience required

Subcontractors (common to both experts) must have:

- Sound knowledge of social dialogue systems in member states and at EU level, including labour market issues and the functioning of employers and trade unions organisations;
- Sound knowledge of the EU social dialogue and autonomous framework agreements;
- Successful management of social partners organisations at national level and/or European level;
- Ability to formulate recommendations of political importance;
- Ability to work in team;
- Planning skills;
- Reporting skills (in English);
- Ability to work within specified deadlines and to respect budgetary limits.

9. Time schedule

The subcontractors will be asked to perform their work between 1 November and 30 September (11 months).

10. Payment

The total maximum budget available for the experts' fees is the following:

Expert for employers: 7.500 EUR (including VAT);

Expert for trade unions: 7.500 EUR (including VAT).

These amounts will cover the experts' fees, but do not include the travel and subsistence costs incurred by the experts for conducting the country visits. As mentioned above, a travel fund is foreseen for these costs, which will be covered separately by ETUC (on the basis of EU rules & thresholds).

11. Award criteria

The contract will be awarded to the bidders offering the best value for money, taking into account the specific 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.

12. Selection criteria

The offers will be examined against the following criteria (applying to both experts):

- Successful track record in social dialogue over a long time-frame (12+ months);
- Expert knowledge of labour market issues and social dialogue at national and EU level;
- Experience in working with social partners organisations at EU and national levels;
- Ability to identify and integrate analyses of the actual challenges in the social and economic field currently faced by social partners in Europe;
- Ability to propose potentially consensual solutions reconciling the views of the employers and workers side;
- Ability to understand the stakes and main objectives of the action;
- Experience in coordinating large-scale international activities;
- Proven project and managerial skills;
- Ability to conduct meetings and draft documents in English;
- Proven track record of quality and concise written materials, both in terms of content and format (i.e. deliver publishable documents, presentation of cases, etc.);
- Respect of deadlines;
- Respect of the budgetary constraints.

13. Content and selection of the bids

Offers must be sent within 40 (forty) calendar days of the date of publication of this call for tender on the partners websites, by **13 October 2019**.

Tenders must be sent to ETUC (see contact address below).

Bidders must clearly indicate in their proposal their wish to join the team as:

the expert for employers;

or

the expert for trade unions.

Tenders must be written in English. They must be signed by the bidder or his duly authorised representative and 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 bidders will be judged on the content of their written tenders, 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 expert and/or possible other team members;
- 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.

Prices must be fixed amounts and shall not include travel expenses and daily allowances for the fact-finding missions and meeting attendance (which will be covered separately by the ETUC on the basis of EU rules & thresholds).

The maximum amount available for this contract is EUR 15,000 (all taxes included).

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

To ensure confidentiality, bidders must:

- submit their offer in a sealed envelope;
- 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'offres – 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 at least four representatives of the European social partners (ETUC, BusinessEurope, CEEP and SMEunited). 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.

The contracting authorities will then make their decision and notify the bidders.

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

ETUC
Alexandre MARTIN (EU Grants and Projects)
Boulevard du Roi Albert II, 5
1210 Brussels
BELGIUM

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