



## **Tender Specifications** **for subcontracting external expertise \***

**INTEGRATED PROGRAMME of the EU Social Dialogue 2013-14**

**“Skills needs in greening economies”**

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*\* Under reserve of acceptance of the project by the European Commission*

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# **1 BACKGROUND**

## **1.1 Introduction**

The European social partners ETUC, BUSINESSEUROPE, CEEP and UEAPME have undertaken to develop a joint project entitled "Skills needs in greening economies".

They have therefore responded to a call for proposal of the European Commission (Budget Line 04-03-03-01) to obtain the necessary funding in order to be able to carry out their action, with a final decision expected in November 2012.

In the framework of this call, they express their intention to select a subcontractor.

This call for tender describes the subcontracting work needed to carry out this 18-month joint project.

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

## **1.2 Objective and Method**

Through their 2011 joint study on national and sectoral initiatives, the European social partners conducted an analysis of tripartite and bipartite practices at national and sectoral levels.

This joint study has identified a number of issues regarding the involvement of social partners on interlink between climate change, employment and training policies across Europe.

Building on the 2011 joint study, European social partners want to look into more detail at different models of social partner participation and engagement in the transition towards a low-carbon economy, including some which may have emerged since the study took place.

In line with the 2012-2014 work programme, the focus will be put on the implications of the greening of the economy on skills needs.

In terms of methodology, the European social partners will ask a subcontractor/expert to identify existing practices, based on the joint initiative, as well as a number of new initiatives (up to 30 cases in total), illustrating concretely these elements and challenges.

In order to better detail the cases, the subcontractor will conduct several interviews and will organize – if needed – 10 country visits.

The European social partners will organise a joint conference to present the main practices identified (80 participants, 40 from each side, 1.5 days) and to discuss possible lessons learned on social partner involvement in better responding to changing skills needs in greening economies.

All EU 27 Member States and candidate countries will be invited to participate, as well as the European Commission. This 1.5 day Conference will take place in Brussels.

### 1.3 Activities

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

<b>Provisional Calendar of activities "Skills needs in greening economies"</b>	
<b>2012</b>	
September	• Launch of the call for tender
October / November	• Selection Committee choice of subcontracted expert
December / January	• Signature of the contract with the expert • Steering Committee Meeting <b>1</b>
<b>2013</b>	
January / June	• Desk-research / interviews (country visits)
May / June	• Steering Committee meeting <b>2</b>
July/December	• Finalisation of the background document • EU-Level conference
November / December	• Steering Committee meeting <b>3</b>

#### One-day Brussels-base "Kick-off" Steering Committee Meeting

- 10 participants
  1. 8 EU secretariats
  2. 2 expert coordinators
- Date: December 2012/January 2013.

Two further 1-day Steering Committee meetings are foreseen in Brussels with the same format:

- one meeting after desk research (May/June 2013)
- one last meeting of follow up including the preparation of the conference (November/December 2013)

#### One Travel Fund

A travel fund for up to 10 2-day trips in Europe will be available for the subcontracted expert to conduct interviews to identify/ to analyse the practices.

#### 1.5 day Brussels-based EU-level conference

- +/- 90 participants
  - 80 national social partners (40 trade unions, 40 employers)
  - Up to 10 EU secretariats and experts
- Date: July 2013 – December 2013
- Working languages: English + French + German + TBC (2 other languages)
- Date: July/December 2013

## 1.4 General organisation and description of project partnership

This action will be managed by ETUC (on behalf of the four EU social partners organisations ETUC, BUSINESSEUROPE, CEEP and UEAPME), under the supervision of a steering committee composed of representatives of the four partners, namely: ETUC, BUSINESSEUROPE, CEEP and UEAPME. In addition, the partners will provide expertise for the project components, the EU-level conference and the steering committee meetings in Brussels.

For the implementation of this project, an expert will be contracted for an estimated 40 (forty) days' expertise:

- He/she is responsible for the planning of the project, including the general coordination with the project partners and insuring that budgets and deadlines are respected;
- He/she will apply wherever possible a balanced approach when identifying and proposing practices in line with the different partners objectives.

Please refer to the subcontractor terms of reference (Section 2 onwards) for a more detailed description of the experts' tasks and deliverables.

The project accounting and production of the final report for the European Commission will be carried out by ETUC.

## 2 PURPOSE OF THE TENDER

The tender aims at finding a subcontractor to carry out the joint project of the European social partner organisations entitled "**Skills needs in greening economies**".

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 35 (thirty five) days on their respective websites.

## 3 TASKS TO BE PERFORMED BY THE SUBCONTRACTOR

The subcontractor should provide the following services for the applicant organisations:

- o Propose an action plan during the first Steering Committee meeting, including the timeframe and planning of activities, to be validated by the partners,
- o Present the methodology;
- o Map initial relevant practices at the workplace, based on a detailed action plan;
- o Produce a detailed support document and database to keep track and assemble the relevant practices. All technical documents used and reviewed should be appended;
- o Organise one Steering Committee meeting at intermediate stage, in close coordination with the partners.
- o He/she will have at his/her disposal the possibility to undertake up to 10 2-day trips funded visits to certain countries to organise face-to-face interviews. The expert will be responsible for the planning and organization of the travels required to run the interviews, including the validation of cases with the partners and a detailed reporting of experiences;

- Start organising the EU-level conference by proposing a detailed agenda and help in the selection of a conference venue;
- Organise one final steering committee meeting, in close coordination with ETUC's Project Administrator.
- The expert will be responsible for the finalisation of all project deliverables;
- Advise on the choice of guest speakers to be invited, case studies to be presented;
- Animate the conference and contribute to organise the moderation of the discussions in order to ensure an interactive nature of this exercise, including receiving questions from the audience;
- Draft a post conference summary of proceedings (max. 10 pages);
- Liaise with the steering committee when coordinating with speakers the content of presentations / interventions in line with the rationale of the conference;
- Finalise all conference materials;
- Ensure that the final outcomes can be used as to be disseminated widely, providing technical and practical approach, to be user friendly and in line with the overall objective of the project;

The subcontracted expert will be responsible for proposing an agenda for each Steering Committee meetings and will draft the summary of conclusions. Both the agendas and the summary of conclusions will be validated by the partners.

## **4 EXPERTISE AND EXPERIENCE REQUIRED**

### **Subcontractor**

Sound experience is required in the following areas:

- Successful track record in delivering research-based projects over a long time frame (12+ months);
- Ability to formulate and carry out a tailored methodology involving a variety of actions (i.e. mapping of practices, European events);
- Coordinating, running and animating large-scale international events (of up to 100 participants), preferably on the issue of skills;
- Strong project management and planning skills;
- Reporting skills (in English);
- Ability to work within specified deadlines and to respect budgetary limits.

Sound expertise is also required on the following issues:

- Knowledge of social dialogue systems and labour market issues in member states and at EU level;
- Ability to inform and analyse skills issues identified at the workplace.

## **5 TIME SCHEDULE AND REPORTING**

The subcontractor will be asked to work from 01 December 2012 to 31 May 2014.

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

The subcontractor will be asked to work 40 (forty) days.

**6 PAYMENT**

The total maximum budget available for expertise is as follows:

Contract with ETUC		
Daily rate	Days of work	€
€ 550	x 40 days	22,000
<b>TOTAL € 22,000</b>		

In accordance with the above table, the subcontractor will enter into a contract with ETUC for a total of € 22,000 (all taxes included).

The subcontractor will receive an advance, interim and final payment.

**7 PRICE**

**Contract with ETUC:**        € 22,000.

**TOTAL:**                                **€ 22,000.**

**8 SELECTION CRITERIA**

The offers will be examined against the following criteria:

- Ability to formulate and carry out a tailored methodology involving a variety of actions (i.e. mapping of practices, European events);
- Experience in coordinating, running and animating large-scale international events, preferably on the issue of skills;
- Successful track record in delivering research-based projects over a long time frame (12+ months);
- Project management experience are essential requirement;
- Expert knowledge of skills, labour market issues, and social dialogue at national and EU level;
- Experience in working with social partners organisations at EU and national levels is an asset;
- 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 conduct meetings and draft all documents in English;

- Proven track record of ensuring the quality of written materials prepared, both in terms of content and format (i.e. deliver publishable documents, presentation of cases, etc.);
- Good administrative skills;
- Respect of deadlines;
- Respect of the budgetary constraints.

## 9 AWARD CRITERIA

The contract will be awarded to the tender offering the best value for money, taking into account the specific object, 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 15 (fifteen) days of the date of publication of this call for tender on the partners, by 10 October 2012. Offers must be to ETUC (see contact address below).

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 UEAPME). 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 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:

**ETUC**  
Patrick Itschert  
Deputy General Secretary  
Boulevard du Roi Albert II, 5  
B – 1210 Brussels  
BELGIUM

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

## **11 ANNEXES**

- Detailed project description