

Call for tenders for subcontracting expertise – ETUC project on Improving social partners’ involvement in EU support for public investments in training and education

This is a call for a subcontractor to provide expertise as part of the implementation of the ETUC project on “Improving social partners’ involvement in EU support for public investments in training and education”.

In order to ensure a large visibility of this call for tender, the ETUC will publish the tender specifications on its website, on Friday 15 January 2016, and keep it online for 24 calendar days (deadline for submission of bids: Monday 8 February 2016).

1. Summary of the project and description of the objective

Education and training are in the focus of the EU2020 objectives and of the strategic framework for European cooperation in education and training (ET 2020), the Copenhagen process and of the Bruges Communiqué.

There are various types of funding which support the public budget on training and education, having an effect on the development of professional requirements and on training of the workers such as:

- The European Structural and Investment Funds, in particular the European Social Fund
- The European Investment Bank provides loans for the infrastructure of schools
- National public investment banks also provide loans to public Schools
- In many Member States there are bipartite training funds managed by social partners at sectoral level which focus on lifelong learning and training activities.
- The European Commission’s Investment Plan for Europe launched on 26 November 2014 foresees significant measures in terms of investment in training and education with the involvement of mostly private investment through the European Fund for Strategic Investment (EFSI).

The objective of the project is to enhance the role of social partners at European, national, and regional level, in funding and investment opportunities for training and education. The project will contribute to the implementation of the European Fund for Strategic Investment and the enhanced implementation and use of funds provided by ESF and by EIB.

The project will conduct two “mapping-out” studies, one at European level and one at national level:

Research Study 1. What is the current picture of EU funding and investment allocated to publicly provided training and education; who makes the decision on the design, the principles and on the

priorities and what is the role of the social partners on these decisions? Interviews will be conducted with European-level decision makers and social partners.

Research Study 2. How is this funding and investment implemented at national, local and regional levels regarding public funding for different training and education programmes, infrastructure, technical equipment, etc., and what is the role of the social partners on these decisions? Interviews will be conducted with national level decision makers and social partners in 15 countries.

The countries will be chosen according to the criteria of:

- Having active social dialogue on funds and investment in training and education (e.g. DE, AT, SE, DK);
- The need for improvement in social dialogue on funds and investment in training and education (eg.SK, HU);
- The involvement of social partners in decisions on the use of ESF funds on training and education (LV, EE);
- High public-private partnership allowing the implementation of EFSI (e.g. BG);
- Other relevant criteria.

2. Methodology

The subcontractor will be asked to produce two research studies based on desk research and European/national/regional level interviews.

For Research Study 1, working methods will consist of a period of desk research followed by interviews with European level actors. These interviews will focus on mapping out the funding and investment opportunities at European level, and will involve EU level actors such as the European Commission, the European Investment Bank and cross-sectoral and sectoral social partners at European level. This study will be used by the project advisory committee to produce recommendations. Both the study and the recommendations will be presented at a European level conference in October 2016.

Research Study 2 will require a period of desk research followed by interviews with national level actors. This second study will map out national-level implementation of the identified funds as well as ascertain the role of the social partners in the decisions on the use of these funds. The subcontractor will conduct interviews with the major decision makers and beneficiaries in relation to the use of EU funds for training and education at national level as well as other national funds. The interviews will be made in 15 countries with CEEP and EFEE members (in the latter case Ministries of Education and school head associations), Ministries of Finance, Ministries of Employment, and trade union members of the ETUC and ETUCE.

On the basis of the second research study, the project advisory committee will develop recommendations to be presented at a conference involving European and national level actors.

The subcontractor will attend steering group meetings regularly in Brussels to allow the steering group to monitor and contribute to the work of the subcontractor, and the subcontractor will be expected to contribute the conferences foreseen in the project. The steering group will consist of members from the ETUC and CEEP, as well as their affiliated sectoral members ETUCE and EFEE.

3. Tasks to be performed by the subcontractor

The subcontractor should provide the following services for the ETUC:

- Conduct qualitative research on the current picture of EU funding and investment allocated to publicly provided training and education;
- Identify who makes the decision on the design, the principles and the priorities and identify the role of the social partners on these decisions;
- Conduct interviews with key stakeholders at European level, including the European Institutions, the EIB, and other relevant actors;
- Map out the implementation of funding and investment for education and training at national level;
- Conduct interviews with national level actors, such as national public investment banks, Ministries of Education and Finance, as well as social partners;
- Identify the role of social partners in the decision making process related to funding and investment in education and training;
- Produce two written studies based on the research undertaken at European and national level;
- Liaise closely with the project steering group;
- Present the research studies at the conferences (2) foreseen in the project.

4. Expertise, experience and skills required

Expertise required:

- Expertise on EU funding and investment, including inter alia, the European Structural and Investment Funds, the European Fund for Strategic Investment, and the European Investment Bank;
- Knowledge of European level policies on adult education and VET;
- Experience in working on European level projects;
- Experience in working with social partners at both European and national level;
- Network of contacts with national-level trade union and employer organisations.

Skills required:

- Proven ability to carry out in-depth research on EU issues and understanding links between European and national level
- 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
- Ability to travel for an estimated 15 country visits in Europe during the project timeframe

5. Time schedule and reporting

The subcontractor will be asked to produce the first research study by **September 2016**, in time to allow the formulation of recommendations by the project advisory committee for a conference in October 2016.

The subcontractor will be asked to produce the second research study by **September 2017**, in time to allow the formulation of recommendations by the project advisory committee for a conference in October 2017.

The subcontractor will liaise closely and report to the steering group. The subcontractor will attend 5 meetings of the steering/advisory group, which will be held **between March 2016 and September 2017**.

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 and country-visits ▪ Drafting research studies (2) ▪ Participating in the steering group meetings (5) and in the project conferences (2) 	
Total budget for the Expertise	€
	57.000 € (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 steering group meetings and conducting the 15 national interviews for Research study 2. These will be covered by ETUC on the basis of EU rules & thresholds.

7. Selection criteria

The selection criteria are:

- Verifiable expertise, experience and skills, as required and described in part 4 of this call;
- 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 of EU Funding and investment in Education will be considered a plus.

8. Form, structure and content of the tender

Tenders must be written in either 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.

Prices must be fixed amounts and shall not include travel expenses and daily allowances for the 15 country visits and steering meeting attendance (which will be covered by ETUC on the basis of EU rules & thresholds).

The maximum amount available for this contract is EUR 57,000 (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

This call for tenders will be published on the ETUC website on Friday 15 January 2016. Offers must be sent within 24 days of the date of publication, by Monday 8 February 2016. Offers must be sent to ETUC, in both formats: electronic (by e-mail to amartin@etuc.org) and as a paper copy (see contact details below).

Concerning the paper copy, to ensure confidentiality, bidders must submit their offer in a double envelope. Both envelopes must be sealed 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 Education and Investment Project – 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 of representatives of the ETUC and CEEP Secretariats. 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.

Candidates must send their bid electronically – to the following e-mail address: amartin@etuc.org – as well as submitting a paper copy of their bid, either delivered by hand or by registered mail or special courier service to:

ETUC Thiébaut WEBER

Confederal Secretary

International Trade Union House

Boulevard du Roi Albert II, 5

B – 1210 Brussels

BELGIUM

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