



## **Call for tenders**

### **Integrated Projects of the EU Social Dialogue 2014-16**

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

Date of publication on the ETUC, BUSINESSEUROPE, CEEP and UEAPME websites	<b>28 August 2015</b>
Deadline to respond	<b>07 October 2015</b> <i>5pm Brussels time</i>

#### **Tender specifications for subcontracting external expertise**

**Title: “Promoting social dialogue and better implementation of EU social partners’ autonomous framework agreements in selected countries”**

#### **1. Introduction**

The European social partners ETUC, BUSINESSEUROPE, CEEP and UEAPME 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 2014, respectively with ETUC and BUSINESSEUROPE (on behalf of CEEP and UEAPME) to carry out the Integrated Projects of the EU Social Dialogue 2014-16 (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 8.5-month timeframe.

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

## **2. Background**

The social partners have an important role, amongst other things, to improve the functioning of the labour markets. At the same time, social dialogue, in some countries, is under strain.

In their recently agreed work programme for 2015-2017, the European social partners aimed to strengthen social dialogue at all appropriate levels, including in order to reflect and respond to the needs of more diverse economic and social situations in the enlarged European Union.

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).

This contract focuses on at least 8 countries where a lack of or weak implementation have been observed for one or more of the four autonomous framework agreements, namely:

- Bulgaria
- Croatia
- Cyprus
- Estonia
- Greece
- Hungary
- Lithuania
- Malta
- Romania
- Slovakia

This process will lead to identify the practical / structural / legal reasons explaining the situation in the countries concerned, and the capacity / organisational constraints that these organisations may face. The aim is to find solutions at national level, and present a summary of the challenges to be met and possible ways forward.

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

This work will also complement a general overview on the state of play of implementation of autonomous agreements in the 28 EU Member States currently being discussed by the European social partners in the context of the cross-industry Social Dialogue Committee and 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 and better implementation of EU social partners’ autonomous framework agreements in selected countries”**.

**Two experts** (one for the trade unions’ side, one for the employers’ side) 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 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 details about the situation in the countries covered concerning the implementation of the four autonomous framework agreements.

The role of EU financial support to strengthen the capacity of national social partners to implement agreements will be envisaged, i.e. 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.

#### *Draft country profiles*

At early stage in the process, the subcontracted experts will start drafting factual country profiles for each country concerned, structured around three main parts:

- Part 1: Involvement in EU social dialogue
- Part 2: Situation in each country concerning the four autonomous agreements
- 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 provide to the experts a short description of key features and trends of national social dialogue in the 8 countries concerned, notably based on available research (e.g. Eurofound);
- will contact their respective members in the 8 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.

#### *Travel fund*

A fund is available for the two subcontracted experts to travel together with representatives of the EU social partners to up to 5 countries (5 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.

As specified above, the European social partners are committed to find possible ways to make further progress on the linkages between national and European social dialogue and improve the implementation of their autonomous framework agreements, including, where needed, further promotion of social dialogue at national level.

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 (namely the Social Dialogue Committee, the final project conference, and national capacity building seminars).

**5. Provisional calendar of the action**

2015	
August/October	Launch of the call for tender and selection committee (choice of the experts)
October	Steering committee 1 “Kick off” (Brussels)
November/December	Fact finding phase
2016	
January	Fact finding phase (continuing)
January/February	First draft country profiles
February	Steering committee 2 (Brussels)
February/March	Country visits (where appropriate)
April/May	Final country profiles
May	Steering committee 3 – Final (Brussels)
May	EU social partners conference

## **6. Link with other related activities**

The final country profiles will feed into the process of monitoring and evaluating the implementation of autonomous framework agreements in the 28 EU Member States.

The final country profiles will also be useful in preparation for an EU level conference on “the implementation of European social dialogue instruments and capacity building”, to be organised in Brussels by the EU social partners in 2016 (budget managed by the ETUC, on behalf of the four EU social partners’ organisations).

## **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 UEAPME.

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 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 15 October 2015 and 31 May 2016 (8.5 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 (fourty) calendar days of the date of publication of this call for tender on the partners websites, **by 7 October 2015**.

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 ETUC on the basis of EU rules & thresholds).

The maximum amount available for each contract is EUR 7.500 (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, BUSINESSSEUROPE, 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.

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.