

TENDER SPECIFICATIONS FOR

SUBCONTRACTING EXTERNAL EXPERTISE

***Project: “Social services in European cross-industry social dialogue:
towards a strong and deeper involvement”***

Tender specifications –project under budget line 04.03.03.01

The contract will be awarded to the tender offering best value for money, that is to say, to the tender offering the best price-quality ratio, care being taken to avoid any conflict of interest. Any special rules in this connection contained in the call for proposals or any other document governing the grants concerned must be complied with.

1. Introduction

Deadline to submit bids:
Publication of the bid: 25 March 2015
Deadline to submit bids: 30 April 2015

Introduction

Social service providers have a distinct social objective. By delivering essential services social services are crucial for the well-being of citizens and for the European social and territorial cohesion.

But so far, with the partial exception of the “Mapping of public services” projects, no studies have been made to analyse these sectors at European level. This project aims to tackle this issue and go further than the outcomes presented in the “Mapping of public services”

project and explore also the question of the involvement of these sectors in cross-industry social dialogue.

These are the main social services activities covered in the framework of this project:

NACE_2007_CODE	NACE_2007_DESCRIPTION
85,59	Other education n.e.c.
86,1	Hospital activities
86,9	Other human health activities
87,1	Residential nursing care activities
87,2	Residential care activities for mental retardation, mental health and substance abuse
87,3	Residential care activities for the elderly and disabled
87,9	Other residential care activities
88,1	Social work activities without accommodation for the elderly and disabled
88,91	Child day-care activities
88,99	Other social work activities without accommodation n.e.c.
90,01	Performing arts
90,02	Support activities to performing arts
90,04	Operation of arts facilities
91,01	Library and archives activities
91,02	Museums activities
91,03	Operation of historical sites and buildings and similar visitor attractions
91,04	Botanical and zoological gardens and nature reserves activities
93,11	Operation of sports facilities
93,12	Activities of sport clubs
93,19	Other sports activities
93,21	Activities of amusement parks and theme parks
93,29	Other amusement and recreation activities
94,99	Activities of other membership organisations n.e.c.

Importance of social services at European level

Social Services are not only vital for citizens, they are also crucial for our economies. Indeed, on a snapshot, social services, both public and private, employ more than 36 million people. Together, these sectors invested 288 € bn into the economy in 2006 (and 216€ bn in 2010). The importance of social services was included in various communications of the European Commission. Speaking about social services, the Communication of the European Commission on a quality framework for services of general interest in Europe (COM 2011-900) states the following:

“The current economic and financial situation has highlighted more than ever the fundamental role of services of general interest (SGI) in the European Union (EU). In areas such as health care, childcare or care for the elderly, assistance to disabled persons or social housing, these services provide an essential safety net for citizens and help promote social cohesion. Services of general interest in the field of education, training and employment services play a key role in the growth and jobs agenda. In the knowledge economy, schools, training centres and universities have to be of the highest quality to guarantee that young people are equipped with new skills for new jobs. At the same time, the budget constraints that currently confront public administrations and the need for fiscal consolidation make it necessary to ensure that high-quality services are provided as efficiently and cost-effectively as possible.”

While the Treaty has always ensured that Member States have the flexibility to provide quality services of this type, the Treaty of Lisbon has introduced new provisions: Article 14 of the Treaty on the Functioning of the European Union (TFEU), and Protocol n° 26 on services of general interest. It has also given Article 36 of the Charter of Fundamental Rights the same legal value as the Treaties. It is in this new context that the Commission has decided to bring together in a single quality framework the comprehensive set of actions which it is pursuing on services of general interest. This will ensure that in the coming years the regulatory environment at EU level continues to reinforce the social dimension of the single market, to take better account of the specific nature of these services, and to meet the challenge of delivering them in a way which incorporates the values of quality, safety and affordability, equal treatment, universal access and users' rights recognised in the Protocol.”

The Commission thus recognizes the importance and added value of these sectors for the economic prosperity, the social wellbeing and the cohesion of the EU. The special supplement on Health and Social Services of the EU Employment and Social Situation Quarterly Review highlights that the social and health services continued to generate one third of the new jobs between 2000 and 2011 and that the sector was growing even during the crisis. In 2011, the number of workers in this sector aged 15 to 64 stood at 22.3 million, i.e. 10.5% of the total in all sectors, having grown by 5 million since 2000, thus accounting for more than a third of the new jobs across the economy.

Investing in these sectors, in their manifold services, generates a good return on investment. These investments improve the quality of life of our citizens and therefore have a huge impact on our economy: a well-educated, employable, resistant, active, creative and healthy population is indeed one of the main ingredients for a good economy.

While the importance of these sectors is further recognized in article 14 of the Treaty on the Functioning of the EU and the impact of the European policies on these sectors is important, their representation at European level is still lagging behind in comparison to other sectors due among other things, to the strong national focus of social services.

Objectives of the project

This project aims to facilitate the stepping up of these sectors at European level within social dialogue thanks to activities of identification and gradual involvement.

The increased involvement of these services in cross-industry social dialogue is a long process and the thoroughness with which preliminary research and preparatory phases are conducted will determine their future involvement and the quality of the social dialogue and of legislation/collective bargaining agreements both at European and at national level. Distinguishing between employer organisations on the one hand and service providers or lobby organisations on the other, is of paramount importance.

The project has 3 objectives:

- to develop the knowledge of the social services branches and the situation of their involvement in social dialogue by collecting key information about these sectors with a survey in 14 EU Member States;
- to raise awareness for the importance of the involvement of social services in social dialogue on European and national level;
- creating a sustainable dynamics on social dialogue in social services by creating a network of social services/social dialogue promoters and organising technical training courses aiming to increase capacity building in social dialogue.

The project aims at improving the knowledge of social services when it comes to social dialogue in their member states and to promote a better inclusion within the existing structures of social dialogue.

Work packages & Methodology of the project

This project will be structured around 6 work packages:

Project management meetings

- This consists of 5 Steering committees that will take place throughout the project. This work package will be the internal management structure and will be responsible to provide the direction of the project, provide the overview of the content and ensure the administrative, financial and narrative follow-up and reporting.

Survey

This part of the project will be subcontracted to experts recruited following a strict call for tender. It will consist of 2 parts:

- A survey mapping the structure and (potential) players of social dialogue in social services
- The preparation of the publication containing the survey results, as well as the project findings and recommendations.

Based on the results of the project 'Mapping of the public services' (published in 2013), this part of the project will dig deeper into the branches of the social services and their specific issues. The work will consist of desktop research, telephone interviews and, where appropriate, meetings. The survey will be conducted in 14 EU Member States (list to be agreed on during the first meeting of the project and based on the suggestions of the experts).

The steering committee will identify the key topics to be addressed: (draft list)

- How operate social services in Europe?
 - Are these services provided by private / public / mixed operators?
 - Are they operating at national / regional / local / sub-local operators?
 - How are they funded?
- How are social services represented at national level?
- What are the main challenges by sectors in each member states?
 - Employment
 - Funding
 - Change in funding
- Key points of interest for European cross-industry social dialogue
- How are the main organisations represented at cross-industry social dialogue level?
- Who are the main (employer) organisations represented at cross-industry social dialogue level
- If there is no representation: who are the main organisations representing the social services branches
- Etc.

The survey will be managed by external experts recruited after an open call for tender. Their work will be carried out through different means (the final methodology will be approved in the Steering Committee meeting):

- The external experts will be asked to collect information via existing documents (desk research). This includes the document already published by Eurofound, by the European Commission (industrial relations reports), or by various other authors;
- A questionnaire will also circulate among members of CEEP to complement the information. The questionnaire will be drafted by the external experts and discussed during the Steering Committee meeting.
- In-depth Interviews of around 30 stakeholders. For these interviews, we will focus on the following countries: Belgium, France, Netherlands, UK, Spain, Austria, Czech Republic, Poland, Germany, Sweden and Finland. In each of these member states, we will plan an interview with 3 persons: someone from an organisation representing

these services in social dialogue, one top manager of a social services and one person involved in national social dialogue.

ROUND TABLE MEETINGS

These meetings will be held in 4 of the partner countries.

4 of the partners will each host a 1 day meeting. Participants are those organisations that were identified in the survey as relevant social services structures playing an important role in the social dialogue.

They are regional events: participants will come from the host country but also from the neighbouring countries in which the survey is conducted.

Each round table meeting consists of:

- A presentation of the social dialogue system(s) in the region
- A discussion of the survey results
- A brainstorming session on further cooperation and introducing the topic of 'technical training courses'
- A networking event leaving time for individual discussions & contacts

TECHNICAL TRAINING COURSES

- Capacity building - Unveiling the constituent parts defining an employer organisation in the social dialogue

A successful development and growth of the European social dialogue with the social services and assumes the right partners at the table with the appropriate knowledge at every level.

A successful development and growth of the European social dialogue with and for social services presupposes a correct understanding of the how and why of the European social dialogue:

- How is it structured?
 - Where does it come from?
 - How does the European social dialogue, the pay and employment conditions in the various EU Member States? And how can national social partners/employers organizations are giving the European social dialogue form and send and execute?
 - The theory will be put into practice through the presentation of concrete examples from both the European and national reality.
- Premise for an efficient European social dialogue - An unequivocal mutual understanding between the European and national level

The successful development and further growth of the European social dialogue with a higher inclusion of social services presupposes a correct understanding of the *how* and *why* of the European social dialogue.

The European social dialogue, how is it structured? Where does it come from? Is it a consequence of the increasing European influence in the social policy areas? Is it a consequence of the European economic policy with the Single Currency and the Stability Pact which increasingly directs the national policies?

How does the European social dialogue affect the pay and working conditions in the different EU member states? And how can the national social partners/employers' organisations shape the European social dialogue and implement its results?

The role of the external experts will be:

- to stir and moderate the discussions during the meetings
- to present background information during these meetings
- To draft and discuss the agenda of these meetings

PUBLICATION: REPORT

The results of the survey, the findings of the round tables and the recommendations will be gathered, edited and published in a report. This should be ready before the dissemination event. The report will be in English.

The role of the external experts will be to:

- Suggest and discuss the table of content with the members of the Steering Committee
- Draft the report

DISSEMINATION EVENT

This will be organised by the lead applicant and consists of 2 parts: a gathering of (potential) social dialogue representatives from the 14 countries and an academic seminar to present the project findings and discuss with European stakeholders ways and opportunities for a stronger and deeper involvement of social services in European cross-industry social dialogue.

The role of the external experts will be to:

- Draft the agenda
- Draft the report

Timetable

Total duration: until 1 September 2016

The bullet points below are indicative timeframe as from May 2015

- Project meeting 1: month 1
 - Project meeting :
 - meeting the project partners
 - agreeing on reporting & accounting procedures
 - discussing the different elements of the project (including dates for the next project meetings & round tables)
 - discussing the terms of reference for the survey
 - preparing project leaflet & logo for spreading among network, during round tables ; to contacts identified in the survey; etc.
- Survey + preliminary report: months 2-6
- Project meeting 2: month 7
 - Project meeting:
 - Presentation and discussion of the findings of the survey
 - Elaboration of a harmonised way of organising the round tables
 - Networking event: presentation of social dialogue situation in host country ; discussion between different social partners/stakeholders in social services in the host country ; informal gathering of all participants to exchange contacts and good practices
- Round tables 1 – 4: months 8 - 14
- Project meeting 3: month 12: have this project meeting coincide with the 2nd or 3rd round table meeting
 - Taking stock of the project progress
 - Collecting feedback from the previous round tables
 - Preparing technical training course(s)
- Training course(s): month 14
- Project meeting 4: month 14: have this meeting coincide with 1 of the training courses
 - Presentation and discussion of the outcomes from the round tables
 - Discussing the publication of the report
 - Formulating recommendations for a more active involvement of social services stakeholders in social dialogue at national & European level
 - Preparing the dissemination event
 - Taking stock of the project progress and project expenditure
- Publication of report with recommendations: month 16
- Dissemination event in Brussels: month 16

- Final Project meeting 5: month 16: have this meeting coincide with the dissemination event.
 - Part 1: let this coincide with the ‘gathering of social dialogue representatives from the 14 countries’ foreseen during the Dissemination event. The goal is to discuss ways to have a sustainable structure for promoting social dialogue in social services and investigating ways to insert social services in the European social dialogue.
 - Part 2 is only for the project partners:
 - Settling the administrative, narrative and financial requirements of the final report
 - Discussing ways for future cooperation

5. Purpose of the tender

The purpose of the tender aims at finding a subcontractor who will manage the survey and animate the trainings.

6. Tasks to be performed by the contractor

Description of tasks

Tasks involved:

Subcontractor Survey

- Identify, together with the partners, the key topics to be addressed
- To develop, together with the partners, a format to harmonise the findings
- To identify, together with the partners, 14 countries to be mapped
- To gather information on the specific social dialogue structure and players for the social services branches in the 14 identified countries.
- To prepare a report with the survey findings and a list of relevant contacts (persons + organisations)
- To present the report at a project meeting
- To gather and analyse the findings of the round table meetings
- To identify, together with the partnership, the key recommendations of the project
- To edit all information and make it available
- To draft a 2-page executive summary
- To present the publication at the dissemination event

7. Expertise required

To be able to contribute effectively to the success of this project, the expert(s) selected must have significant knowledge in social dialogue.

The consultant must be able to work effectively at European level as well as at national level. Language capacity and good understanding of various EU “cultures” is therefore required. The consultant must be able to demonstrate experience in conducting broad EU-wide studies.

Expertise must be evidenced through the proposal for carrying out the work, past experiences / references and CVs of proposed staff members.

8. Payments and standard contract

30% of the total sum can be invoiced at the beginning of the work, 30% in the middle of the project and the balance after receipt of the final instalment from the European Commission. A contract will be issued between the consultant and the contracting authority (CEEP).

CEEP reserves the right to reduce the final amount should the report and deliverables be poor in quality or written in poor English. In this case, the budget for external expertise will be reduced by the cost needed to revise the report.

9. Prices

Prices must be quoted in Euro (using, where appropriate, the conversion rates published in the C Series of the Official Journal on the day when the invitation to tender was issued) and broken down to express:

- Professional fees, expressed as the number of person-days multiplied by the unit price per working day for each expert proposed. This unit price should cover fees and administrative expenditure.

In the budget of the project, an amount of Euro 37 000.00 is estimated for the external expertise.

The price was calculated based on an estimation of 42 days of work for two persons for a daily cost of 450€.

Travels necessary for this project will be reimbursed following the rules of the European Commission (economy class flights, most direct journey). Travel costs are on top of the consultancy fees and will be reimbursed based on invoices, original boarding passes and tickets.

Please note that, if the final report is of low quality and / or the English language is poor, the budget for external expertise will be reduced by the cost needed to revise the report.

10. Award criteria

The contract will be awarded to the tender whose offer represents the best value for money – taking into account the following criteria:

Expected knowledge:

- EU and its social policies
- Social dialogue and its national & European structures
- Social services
- Conducting surveys
- Process information in at least 3 working languages
- Good chairing capacity;

It should be noted that the contract will not be awarded to a tenderer who meets less than 50% of the award criteria.

12. Content and presentation of the bids

Tenders must include:

- All information and documents necessary to enable to appraise the bid on the basis of the selection and award criteria (see points 5 and 6 above);
- Detailed CV of all members of staff to be assigned to the project

13. Presentation of the bids

Bids should be presented in two versions and must contain all the information requested in the point 12. Bids must be sent to meet the deadline in line with the specific requirements of the tendering process.

Bids should be sent to:

CEEP
CEEP Projects
Rue des DeuxEglises, 26 bte5
BE – 1000 Brussels
Belgium

And to:

David.anciaux@ceep.eu and to ceep@ceep.eu