

Publication of the bid: 13 October 2023
Deadline to send bids: 24 November 2023
Project ID: 101102354

TENDER SPECIFICATIONS FOR SUBCONTRACTING EXTERNAL EXPERTISE

PROJECT: “Accessible Climate-Conscious Essential Services”

Background

SGI Europe has decided together with its project partners UFE, USH and BDEW to conduct a project on access to essential services. This project will be supported by funding from the European Commission. The project activities will start in October 2023, and the subcontracted experts' contract will start in December 2023. In the framework of this call, the project partners express their intention to select a subcontractor to carry out over 24-month the activities listed in this call for expertise. The tender specifications included in this document detail the background, tasks, price, and selection criteria and procedures regarding the subcontractor.

Context

Implementing in full the principles of the European Pillar of Social Rights will be key to ensuring the twin transition success, balancing the environmental, social, and economic dimensions. This process must rely on detailed, trustworthy, and accessible data and indicators regarding the access to essential services. The implementation of the EU climate action will have to integrate this dimension at its core to foster its acceptability for all EU citizens.

The COVID-19 pandemic and the consequences of the war in Ukraine clearly highlighted the extent to which our current indicators are falling short to measure the growth, prosperity, and wealth of our societies, whilst SGIs and essential services have demonstrated their pivotal role in ensuring the continuity and resilience of the EU socio-economic model.

The European Pillar of Social Rights, in its principle 20, states that everyone has the right to access essential services of good quality, including water, sanitation, energy, transport, financial services and digital communications. It stresses that support for access to these services should be available to those in need. Essential services also support access to a wider set of enabling goods and services – amongst others early childhood education and care, education and training, healthcare, long-term care and social inclusion services.

However, data and monitoring tools to assess access to essential services and the effectiveness of support measures are scattered and underdeveloped, and important knowledge gaps remain. Information on access to essential services is not regularly collected in a structured way at EU or national level and administrative data are scarce.

The quality and cost of essential services have a tremendous impact on the overall poverty and inequality levels. Accordingly, a core interest of SGI Europe members, regarding the measure on the health of the European economy and society, remains the development of detailed indicators regarding the evolution towards improving access to quality essential services.

Objectives of the project

This 2-year project coordinated by SGI Europe, in partnership with of the UFE, USH and BDEW.

The project's general objective is to strengthen SGI's capacity to engage in national social dialogue and to contribute to national and EU policymaking through developing further research and evidence concerning the defining indicators, monitoring, and evaluation of progress towards the provision of adequate access to essential services.

In the context of the project, a specific focus will be put on the following sectors: water, energy, housing.

The specific objectives of the project are:

- Produce a final analytical report which maps in a comparative way the existing data and evaluation tools related to the access to essential services, focusing on availability, affordability and quality, and the needs for the twin transition and overall resilience of the services. The objective is to develop a set of qualitative indicators to better measure and assess the evolution towards the access to essential services across the EU.
- Contributing to the use of evidence for EU policymaking by assessing the impact of the measures implemented by Member States for addressing access to essential services, such as reduced tariffs, cash or in-kind benefits, ensuring supply, targeted measures or universal measures, etc.
- Raising awareness about SGI Europe's contribution to the implementation of principle 20 of the European Pillar of Social Rights through gathering more data about their sectoral specific activities and highlighting the relevance of our members in improving access to essential services.
- Strengthening SGI Europe's members' capacity to engage in social dialogue in the context of sustainability, social and environmental changes, adapting their method of work according to the changing policy framework (e.g., the European Pillar of Social Rights and the European Green Deal), and strengthening SGI Europe's members' capacity to contribute to EU policy making.

Through the themes covered, the project will address challenges and priorities set in the European Commission Political Guidelines for 2019-2024, the European Pillar of Social Rights and its Action Plan, and the European Commission's proposal for a Council Recommendation on ensuring a fair transition towards climate neutrality. In the context of the project, a specific focus will be put on the following sectors: water, energy, housing.

Methodology

Duration of activities: 24 months, starting in October 2023 and ending in October 2025

The project is going to adapt the below methodology:

1) Research activities

(a) An online survey addressed to the project partner's members (SGI providers and employers) will be conducted by the expert in the very initial phase of the project. This preliminary survey aims to capture the state of play in the field prior to the project's implementation.

The survey should be accompanied by an initial desk research presenting the state of play on the topic of access to essential services.

The objective of the survey is to get views on the state of play of the access to quality and affordable essential services in the three sectors.

The survey will aim to collect examples of:

- indicators used at national level to measure the access to essential services;
- Measures and policies taken by Member States and good practices at enterprise level to favour the access to essential services;
- Challenges linked to the delivery of essential services (also linked to the digital and climate transitions);

The expert will prepare the questions of the survey, together with the project partners, will collect the various answers and will analyse the results. The work will be based on desk research.

(b) In depth interviews with companies representing the different sectors to dig deeper into the analyses conducted through the survey. The interview will help the project partners to examine what is the enterprises knowledge of the issues and start determining the content of the workshops.

2) Training and practices exchange

(c) Sectoral workshops

These sectoral workshops will bring together all the project's participants in a one-day event, each hosted by a member of the Steering Committee. The workshops will, therefore, represent a platform which will stimulate the exchange of methods for defining and measuring access to essential services, and assess the efficiency of the support measures in the targeted sectors and across the targeted Member States.

Each workshop will be presented and mediated by the external experts in order to foster exchanges between participants on the issues linked to the access to essential services.

Before each seminar, the expert selected after this call of tender will prepare a short discussion paper presenting the sector specificities with regard to access to essential services. These working documents will be used to feed the discussions during these seminars, together with the results of the survey if already available.

The subcontracted expert will participate in these seminars.

Travel funds will be made available in that regard. After each seminar, the subcontracted expert will produce a short report summarising the discussions. The objective of these seminars will be to foster learning and understanding between countries and to raise awareness on access to essential services amongst SGI providers and employers.

Three sectoral workshops in France (2) and Germany (1), aiming to develop knowledge and exchange of information on measuring access to essential services amongst the participants, and facilitate interactions amongst the involved stakeholders.

(d) The development of the final report which maps in a comparative way the existing data and evaluation tools related to the access to quality essential services, focusing on availability, affordability and quality. The final report will also seek to identify a set of qualitative/quantitative indicators to better measure and assess the key dimensions of the effective access to essential services across the EU.

The final report will be produced on the basis on the results of the survey, on the desk-research made by the expert, and on the discussions of the workshops.

The final report should:

- Define the concept of “access to essential services” at EU level
- Provide an analysis of the state of play for the accessibility to essential services for the water, energy and housing sector, encompassing a list of the different indicators commonly used to monitor affordability, availability and quality for the different sectors at both EU and national level
- Identify challenges linked to the delivery of essential services – and preventing access to those – from the perspective of SGI providers and employers
- Provide a list of policy measures supporting access to essential services taken by the EU and Member States
- Compile examples of good practices by SGI enterprises to support access to essential services

A shorter political report version will also be produced by the experts in order to facilitate the dissemination of the project’s outcomes, particularly when it comes to a wider audience.

3) Dissemination

(e) A Final Conference (in Brussels) to present the results of the project. The publication of the final report and its translation into French, German and Italian will also assist other companies in different Member States to adopt similar projects.

The final conference will be organised in Brussels at the end of the project (foreseen in Month 22 of the project timeline). This final conference will:

- Present and discuss the main findings and disseminate the report.
- Discuss other possible following steps.

In between the different steps of the project, **five** steering committee meetings will be held in Brussels. The objective of this Steering Committee is to ensure an effective management and coordination of the project in order to guarantee a successful execution, to meet the project objectives and to lead the project to technical, organisational and financial success.

The Steering Committee is devoted to the supervision of the activities. It includes all the duties related to the contractual, financial, and administrative management, as well as project progress monitoring the entire project. SGI Europe will report to the Commission on the implementation of the project and assure the quality and adequacy of the report and the use of the financial resources.

It is proposed that regular operational meetings (Steering Committee Meetings) will be held amongst the project partners and external experts, particularly before and after events (e.g., research, consultation meetings, development of the methodology).

The Steering Committee together with the expert will prepare and closely monitor the implementation of the communication strategy and ensure the visibility of the project, gathering feedback provided by the different parties involved and guaranteeing that all the relevant information is communicated amongst the whole group of participants, as well as to the external community.

For the first steering committee meeting, the tasks to be performed by the subcontractor are the following:

A Steering Committee for managing and implementing the project will be set up, led by the SGI Europe General Secretariat team, and including representatives of UFE, USH, BDEW and external experts. The Steering Committee will have 5 meetings during the project.

First Steering committee:

- Presentation by the expert and approval by the Committee of a survey to be conducted online (**month 3-4**) and which results will be presented at the Kick-off Conference (**month 5**).
- The experts will present a list of questions for the in-depth interviews that will follow the kick-off conference.
- Discuss the focus of the desk research to be done in parallel to the surveys.

For the second steering committee meeting, the tasks to be performed by the subcontractor are the following:

- Presentation by the expert of the final outcome of the survey and interviews
- Present the outcome of the desk research
- Accordingly shape the format of the 3 workshops

For the 1st Workshop (round table meetings and training), the tasks to be performed by the subcontractor are the following:

- To present the findings from the survey/interview/desk research;
- To moderate the workshops discussions where needed;
- To prepare a summary of the discussions held at each seminar, also in view of the preparation of the final report.

For the third steering committee meeting, the tasks to be performed by the subcontractor are the following:

- Evaluation and feedbacks from the first sectoral workshop
- Organisation of the second workshop
- Update on the progress for the final report

For the 2nd Workshop (round table meetings and technical training), the tasks to be performed by the subcontractor are the following:

- To present the findings from the survey/interview/desk research;
- To moderate the workshops discussions where needed.
- To prepare a summary of the discussions held at each seminar, also in view of the preparation of the final report.

For the fourth steering committee meeting, the tasks to be performed by the subcontractor are the following:

- Evaluation and feedback from the second sectoral workshop
- Organisation of the third sectoral workshop
- Update on the progress for the final report

For the 3rd Sectoral workshop (round table meetings and training), the tasks to be performed by the subcontractor are the following:

- The Experts consolidate the data gathered so far in the sectoral workshop and presents them to the participants.
- To present the findings from the survey/interview/desk research
- To moderate the workshops' discussions where needed
- To prepare a summary of the discussions held at each seminar, also in view of the preparation of the final report

For the fifth steering committee meeting, the tasks to be performed by the subcontractor are the following:

- The project partners adopt the final report
- The expert presents the draft final report, which should make use of the findings of the survey, interviews and desk-research and the discussions at the workshops
- On the basis of the Final Report, the Expert also drafts the Political Short Report (5-6 pages in ENG) that will be disseminated during the final conference

For the final conference (month 22), the tasks to be performed by the subcontractor are the following:

- During the final conference (in Brussels) the expert shall present the results of the project (final report).

The expert needs to ensure that the report is issued following the workshops, to ensure the sustainability of the project. SGI Europe and the project partners will continue to disseminate the outcomes of the project through social dialogue committees and other affiliated stakeholders.

During the whole period, SGI Europe and the affiliated entities will support the experts' work by publishing press releases, newsletters and newflashes to communicate on the results of the project in their network, and on social media channels.

The dissemination activities will encourage the replicability of the project and will increase the interest in sustainable finance. The main event needs to be organised and planned by the expert and will be a one-day final dissemination conference to be organised in Brussels in order to close the 2-year project and to disseminate both the final report and final political report.

Structure of the final dissemination conference – 1-day meeting, Brussels Participants: 60 ; SGI Europe Secretariat team, SGI Europe Social Affairs Board and Sustainability Board members, the project partners, the European Commission and relevant agencies or institutions, European Social Partners, other stakeholders.

Draft Agenda:

- Morning session:
 - Keynote speech from the European Commission
 - Presentation and discussion of the main findings and recommendations of the final output of the project (the methodology).
- Afternoon session:
 - Panel discussion: SGI Europe members on the sectoral challenges linked to access to essential services.
 - Panel discussion: stakeholders views (policy makers, MEPs, sectoral members, member federations...)

Guidance and indications on task execution and methodology

For the implementation of this project, an expert will be contracted for the following work:

- The subcontractor will include in the bid a first outline of its proposed methodology, including with respect to the preparation of the survey and up to 3 country visits.
- The steering group will discuss and agree during its first meeting a proposal prepared by the subcontractor for conducting the initial desk-research and the structure of the survey.
- The subcontractor is responsible for preparing the desk research, survey, phone and physical interviews, which will be the main deliverable from the first phase of the project. The subcontractor will also prepare a final report for presentation at a concluding conference in Brussels. A first draft of the report should be submitted in view of the fifth steering group meeting to allow for corrections, validation approval, and layout and printing in due course before the final conference. The final report should be +/- 70 pages.
- In constant liaison with SGI Europe, the subcontractor will work under the control and supervision of a steering committee.

Expertise required

To be able to contribute effectively to the success of this project, the contractor selected must have significant knowledge in the following:

- Experience in working with social partners at European and national levels
- Advanced knowledge and understanding of services of general interest
- Knowledge on the Action Plan on the European Pillar of social Right
- Proven track record of working with qualitative and quantitative indicators for research purposes
- Successful track record in working on European level projects;

Skills required:

- Proven ability to carry out in-depth research on EU issues and understanding links between European and national levels;
- Proven research skills, including identifying stakeholders and conducting interviews;
- High proficiency in English: ability to draft documents and make presentations in English
- Speaking other EU official language such as German, French and Dutch is an added value
- Ability to work within specified deadlines and to respect budgetary limits

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

Time schedule and reporting

The subcontractor will be asked to work from 11/12/2023.

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

Payments and standard contract

The total maximum budget available for the fees of the subcontractor is as follows:

Contract with SGI Europe

Main activities and Meetings

- Desk research, mapping, survey and interviews
- Participating in the steering group meetings (5), in the trainings (3) and in the final conference
- Drafting final report and final political report

Price

Total budget for the Expertise € 60.000,00 (all taxes incl.)

This amount does not include the travel and subsistence costs incurred for attending project meetings. The subcontractor will be remunerated in various instalments (advance, interim and final payment). 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 (SGI EUROPE).

Award criteria related to the quality of the bids received

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

- Verifiable expertise, experience and skills, as required and described above;
- 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;

It should be noted that the contract will not be awarded to a tenderer who receives less than 70% on the Award Criteria.

Content and presentation of the BIDS

CONTENT OF THE BIDS

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 6.

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.

PRESENTATION OF THE BIDS

Tenders must be written in 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.

The maximum amount available for this contract is EUR 60,000 (all taxes included). Prices shall be fixed and not subject to revision during the performance of the contract.

Offers must be received within 6 weeks of the date of publication of this call for tender by SGI Europe, i.e. by 24 November 2023. Offers must be sent to SGI Europe in both formats: electronic (by e-mail to guillaume.afellat@sgieurope.org and info@sgieurope.org in cc) and as a paper copy (see contact details below).

To ensure confidentiality, **bidders must submit their offer in a sealed envelope**. 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 representatives of the project partners (SGI Europe, HOSPEEM, HEAG Holding). 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:

- The name and address of the contracting authority, the purpose and value of the contract or framework contract;
- The names of any excluded candidates and the reasons for their rejection;
- The names of candidates selected for consideration and the justification for their selection;
- The selected candidate and justification of this 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:

SGI Europe
Rue des Deux Eglises, 26 bte5
BE – 1000 Brussels
BELGIUM