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Deadline to send bids: 24 November 2023
Application ref.: 101102363

TENDER SPECIFICATIONS FOR SUBCONTRACTING EXTERNAL EXPERTISE

PROJECT: “Finance for the European Pillar of Social Rights”

Background

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 Communication on a Strong Social Europe for Just Transitions.

The European Union is in a difficult context of social and economic recovery from the COVID-19 crisis, heavily amplified by the increase of energy prices and high inflation. Since the beginning of the pandemic, services of general interest (SGIs) have demonstrated their central role in the resilience of the European Union social-economic system. Services of General Interest represent the backbone of the European social market economy and are key players in implementation of the European Pillar of Social Rights and in the green and digital transition.

Better non-financial reporting on social aspects has the potential to increase investments flows towards economic activities with positive social outcomes. This is recognised as such in the Action Plan of the European Pillar of Social Rights: “Alongside public resources, the development of sustainable finance also has a key role to play in mobilising the necessary private resources to deliver on sustainable objectives (..) Better public reporting by companies about social issues should facilitate investment flows towards economic activities with positive social outcomes. Better corporate reporting also serves to make companies more accountable for social and other sustainability impacts”.

In this regard, there is a huge untapped potential of the providers of services of general interest, as there is an unbalanced assessment of the impact of the non-financial disclosure requirements on the SGIs and public services providers, especially at the local level, compared to the big enterprises from the private sector.

The employers play a key role in the promotion of decent work and improving living conditions, while testing the implementation of the EU benchmarks for fostering socially responsible investments and consumptions such as the proposed Social Taxonomy plays a key role. It is essential that cheap capital is available also to SGI providers, for improving their contribution to the objectives of the European Pillar of Social Rights.

Purpose of the contract

This 2-year project coordinated by SGI Europe, in partnership with of the European Hospital and Healthcare Employers' Association (HOSPEEM) HEAG Holding.

Building expertise on sustainable finance is indispensable for the materialization of the European Pillar of Social Rights and that is why the main goal of this project is to support SGI employers throughout this journey. The project will create a capacity building framework which aims to unlock SGIs potential to address EPSR objectives using the sustainable finance tools.

This project aims to contribute to the creation of a new learning framework which will support SGI providers in adapting to the sustainable finance requirements, and in scaling up their actions towards improving their contribution to the European Pillar of Social Rights. Many SGIs are indeed providers of services of general interest to local entities and while operating more and more in competition under market rules, have to maintain a wider social responsibility towards the citizens they serve. However, in most cases SGIs lack the necessary knowledge and experience to attract sustainable finance.

The specific objectives of the project are:

- Raising awareness of the role which sustainable finance can play in mobilising the necessary private resources to deliver on the principles of the European Pillar of Social Rights.
- Promoting socially responsible investments by supporting SGIs in taking into account the sustainable finance requirements into their daily management choices, as well as developing expertise and exchange of information and non-financial reporting practices.
- Developing a methodology which will guide SGI providers in identifying their activities in line with the sustainable finance requirements and learning the mechanisms to collect and disclose data. At the same time, the methodology will empower SGI Europe members in the interactions with financing authorities and investments groups aiming for social investments.
- Complementing the European Commission's assessment of the feasibility and practical implementation of the proposed Social Taxonomy, focusing on the costs and benefits for SGI providers and mapping the existing links between SGIs contribution to the EPSR and the objectives of the Social Taxonomy and how these links can be improved for fostering additional contributions.
- Based on the methodology, setting of the basis of a social sustainability label in line with the Taxonomy Regulation for incentivising the providers of services of general interest to implement the Social Taxonomy standards into their daily operations, assess the level of compliance achieved by companies, and providing both the general public and the investors more data on the social impact of SGIs.

Description of tasks

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

The selection will be guided by an evaluation grid that will reflect three major requirements for the position:

- Advanced knowledge and understanding of the European Pillar of Social Right
- Knowledge and previous work experience on the topics of Sustainable finance in particular EU Social Taxonomy based on the recommendations of the Platform on Sustainable Finance Social Taxonomy Report of 2022
- Successful track record in working on European level projects

His/her overall tasks will mainly comprise desk research, elaboration, implementation and evaluation of surveys, interviews and reports, technical supervision of the work carried at the national level, meeting animation and presentations of research findings and support the development of the SGI Europe Social Taxonomy label.

The expert has to lead and follow 2 out of 4 work packages namely:

- WP2: Qualitative Research and Practices exchange (survey, interview and final report)
 - The Expert will animate (and report back) 3 Trainings (June 2024, September 2024, November 2024) to develop the final report
 - The Expert will present the Report in a Final Conference (to be held in Brussels in October 2025)
- WP3: Developing the Sustainable Finance Label for SGI Providers (February 2025-October 2025)
 - Facilitating the publication of non-financial data from SGI providers through the creation of a user-friendly and tailored sustainable finance label
 - Help to develop the usability of a Social Taxonomy among SGI providers through the label
 - Supporting SGI providers through a new label to display to the financial market that their activities are aligned with the sustainable finance set of requirements
 - Running one working group on the label
 - Promoting and testing the label

In the bid:

- To propose a first outline of its proposed technical assessment and training methodology, including with respect to the preparation of the mapping, survey and interviews.
- The contractor will be requested to attend all the project activities and meetings included the Steering Committee Meetings.

SGI Europe plans to subcontract 2 type of services for this project:

- **External expertise** The external expertise is required as we do not have enough in house expertise in sustainable finance due to the novelty but also the complexity of the subject. Moreover, professional research services are required for the in-depth interviews with the members, and for designing correctly the necessary tools such as questionnaires and the content of the trainings.
- **Communication services** The communication services are required for a good quality of dissemination materials including logo, leaflets, roll-ups, templates, etc. SGI Europe does not have the necessary in-house expertise in this regard.

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 HOSPEEM, HEAG and external experts. The Steering Committee will have 5 meetings during the project.

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.

First tasks:

- Presentation by the expert and approval by the Committee of a survey to be conducted online and which the results will be presented at the Kick-off Conference.

An **online survey** to be responded by the participants will be conducted by the expert in the very initial phase of the project:

- Survey (January - March 2024): This quantitative survey aims to collect the perspectives of employers and workers and allow SGI Europe to know the level of awareness of the role of non-financial reporting within the sustainable finance framework including the EU Social Taxonomy. The survey will be disseminated through mailshots of SGI Europe amongst its members to reach the exact target audience.
- SGI Europe will be sharing with the affiliated entities before the meeting an evaluation grid that will serve to the purpose of selecting the best proposal received. The evaluation grid will include aspects such as:
 - Knowledge of EU social dialogue and national industrial relations practices
 - Knowledge of sustainable finance framework
 - Experience in working with social partners at European and national levels
 - Successful track record in working on European level projects
 - Proven ability to carry out in-depth research on EU issues and understanding links between European and national level
 - Proven research skills, including identifying relevant stakeholders beyond the social partners, and conducting surveys and interviews
- The survey will be divided into two sections: Cross-sectoral examples on sustainable finance reporting and sector specific examples.

Cross-sectoral examples of questions and topics to be covered by the survey are:

- Have your company/organisation previously reported on non-financial reporting standards?
- Does your company/organisation have already integrated a department or internal organisation that follows sustainable finance at the national and European Level?
- Where are the biggest challenges in reporting non-financial criteria on social activities?
- Does your company/organisation exchange on a regular basis best practice in sustainable finance reporting and social taxonomy with other EU national stakeholders? If yes, list one or two of your main partner States.

Sector-based examples of questions and topics to be covered by the survey are:

- Do you think the European Commission gives enough guidelines and support to your company or organisation to fulfill the requirements on sustainable finance reporting?
- Do you think that the set recommendations of the EU Social Taxonomy is understandable and easy to apply? Please give 3 examples in your sectors that could use social criteria.
- Do you see clear connections on social reporting standards and the European Pillar of Social Rights? Where could there be made any improvements?
- Regarding capacity to adapt to the fast-changing society: is your company/organisation working on adaptation to the social challenges that occur due to climate change, political conflicts and the economic recession? If yes, how? Please indicate at least 2 examples.

In addition – and as a necessary complementary tool – to the survey, the expert will also be responsible to conduct **follow-up interviews** and **training and practice exchange** and closely monitor the development of the project' implementation.

Interviews

The expert must design the interviews on the basis of the results of the survey. We foresee a maximum of 3 Country visits (Belgium, Germany and France). The amount of Country visits is subjected to the evaluation of the Steering Committee in cooperation with the expert. In depth interviews with companies representing the different sectors to dig deeper into the analyses conducted through the survey. This conversation will assist the involved stakeholders to examine what are the learning needs of the companies and start drafting the content of the trainings and the first part of the methodology accordingly.

The interviews will be elaborated by the expert and applied after the approval of the Steering Committee. Three different sets of interviews will be designed and implemented throughout the project's lifespan. They will share the same overall structure – which will be divided between two main sections:

- Cross Sectoral - Procedural/Methodological Approach
- Sectoral – Technical Approach

Whilst the first section of the interviews will be a uniform body of questions to be equally applied across all stakeholders involved, the second section will contain a set of tailored questions featuring the particularities of each targeted sector.

Cross-sectoral examples of questions and topics to be covered by the interview are:

- Where do you see the challenges and impact of the non-financial disclosure requirements on the SGIs and public services providers? Where are the impacts on the local level compared to the big enterprises from the private sector?
- Do you think as a public service provider and SGI do you have enough capacity and technical expertise to implement EU sustainability benchmarks?
- Where do you think are challenges being created for SGIs and public services to continue in the future to provide access to critical infrastructures?
- Does your company/organisation have previous experiences in the field of non-financial reporting in the social sector? If yes, could you please describe:
 - The implementation process and its main challenges
 - The stakeholder involved
 - The perceived impact of the initiative

- How does the Action plan on the European Pillar of Social Rights and the EU Green Deal influenced your company/organisation when it comes to your non-financial reporting?

Sector-based examples of questions and topics to be covered by the interviews are:

- Do you think you have received enough guidelines and support tools from the European Commission to support SGIs in completing a tailored made non-financial reporting mechanisms?
- How do you think should the EU address non-financial reporting in the European Pillar of Social Right?
- According to your company, as a provider for the critical infrastructure, how can the EU make the transition to non-financial reporting more attractive that will support your company in fostering socially responsible investments and consumptions as proposed in the Social Taxonomy?
- Do you think that European Commission is addressing the issues of connecting the link between social investments in the sustainable finance reporting and the action plans of the European Pillar of Social Right appropriately? Please elaborate

Training and practices exchange

Trainings in Belgium, Germany, and France, facilitated must be organised by the external experts, aiming to develop knowledge and exchange of information on sustainable finance requirements amongst the participants, facilitate interactions with investors, and create the space for discussing the feasibility and practical implementation of the proposed Social Taxonomy. These technical-oriented trainings will bring together all the project's participants and each training will be hosted by a member of the Steering Committee. The trainings will, therefore, represent a platform which will stimulate the exchange of best practices and seek to overcome the barriers that challenge the implementation of sustainable finance requirements in the targeted sectors and across the targeted Member States.

Each training programme will be presented and mediated by the external experts, whilst bringing external stakeholders together in order to exchange on the content, methodology and effective or potential results, depending on their stage of implementation.

Developing a methodology for companies to have a step-by-step guide on how to identify their activities in line with the sustainable finance requirements and learn the mechanisms to collect and disclose data for attracting private investments and contribute more to the EU social objectives.

Developing the key items for setting a sustainability label dedicated to SGI providers which will incentivise them to integrate the sustainable finance requirements in their management decisions, whilst improving the level of transparency of their social impact.

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

- Presentation by the expert and approval by the Committee of the final set of interview questions to be applied for the participants within the water sector.
- Shaping the format of the 3 workshops

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

- To present the findings from the intermediate report
- To moderate some workshops 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:

- Expert presentation on the programme's developments based on the monitoring of the implementation processes and potential country visits
- Presentation by the expert and approval by the Committee of the final set of interview questions to be applied for the participants within the energy and transport sector
- Evaluation and feedbacks from the first sectoral workshop
- Organisation of the second training

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

- To present the findings from the draft report;
- To moderate some workshops 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:

- Expert presentation on the program's developments based on the monitoring of the implementation processes and potential country visits
- Presentation by the expert and approval by the Committee of the final set of interview questions to be applied for the participants within the housing and healthcare sector
- Evaluation and feedbacks from the second sectoral workshop
- Organization of the third sectoral workshop

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

- The Experts consolidate the methodology according to the inputs received in the workshops. This needs approximately three months.
- The Expert also drafts the Political Short Report (5-6 pages in ENG) that will be disseminated during the final conference

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

- The project partners adopt the final version of the methodology
- The expert presents the draft final report, which should make use of the findings of the intermediate report (mapping, survey, phone interviews...) and discussions at the seminars and activities of the project, to draw together some conclusions and recommendations on how to support non-financial reporting and social activities
- On the basis of the Final Report, the contractor will produce a shorter political report (5 pages) for dissemination
- to ensure that the final report is user friendly and in line with the overall objective of the project.

The experts are designing the tools for setting up the label

- Running one working group on the label:
 - Under the lead of the experts, the aim of the group will be to provide inputs regarding the design of the deliverables such as the self-assessment tool and the evaluation criteria.
 - A working group on the creation of the label will be set under the supervision of the Steering Committee Meeting members that have already gained practical knowledge on labels and sustainability reporting. The group will include other members of SGI Europe and the external experts
- Developing the label
 - Based on the methodology and the data gathering in the project through the survey, interviews and trainings, the external experts will set the basis of the label by developing a self-assessment tool, tutorials and an evaluation process based on defined criteria. The conference will involve SGI Europe members, the project partners, European institutions and agencies, and external stakeholders working within or in cooperation with the targeted sectors
- Promoting and testing the label:
 - The results of this assessment process will be Presented by the expert in the final dissemination conference of the project.

Finally, the expert will be in charge of producing a Final Report which will be presented at the Final Conference (month 22) to be held in Brussels. The report will deliver an evaluation of the project's development and results and should not exceed the total of 70 pages. Nevertheless, a shorter version – which will comprise an average of 5 pages – will also be made available in order to facilitate the dissemination of the project's outcomes, particularly when it comes to a wider audience.

The Final Report will be elaborated according to the following structure:

1. Abstract
2. Executive Summary
3. Introduction to the project
 - Objectives
 - Scope
 - Methodologies
4. Chapter 1.
 - Overview and introduction to Sustainable Finance reporting and the EU Social Taxonomy
 - Explain context to the action plans of the European Pillar of Social Right
 - An introduction to the implications of the different sectors in energy, transport, housing and healthcare
5. Chapter 2
 - Identification of the main shortcomings of the Social Taxonomy and its connection to the Actions of the European Pillar of Social Right within the targeted Member States/Sectors

- Mapping of the existing non- financial reporting in social activities within the targeted Member States
 - Identification of best practices and challenges to the implementation of social investments and sustainability reporting across participant Member States
6. Chapter 3
- Identification and main outcomes in guiding the non-financial reporting on social activities in public services and SGIs to foster the European Pillar of Social Rights European wide
7. Chapter 4
- Identification of potential examples to create the key items for setting a social sustainability label in line with the Taxonomy Regulation across targeted Member States
 - Provide examples for guiding public services and SGIs to attract sustainable finance for contributing to the principles of the European Pillar of Social Rights
8. Conclusions
9. Annexes
10. Additional inputs from the Final Conference

For the final conference, the tasks to be performed by the subcontractor are the following:

- A final conference (in Brussels) to present the results of the project. The publication of the methodology and its translation into French and German will also assist other companies in different Member States to adopt similar projects.
- The project will focus on key sectors underlined both in the European Pillar of Social Rights, and in the Social Taxonomy proposal
 - Healthcare
 - Housing
 - Essential infrastructure including clean energy and water

The expert needs to ensure that the reports are issued following the trainings, as well as the final product (methodology) to ensure the sustainability of the project. SGI Europe and the project partners will continue disseminating 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: 80; SGI Europe Secretariat team, SGI Europe Sustainability Board members, the affiliated entities, 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 role that sustainable finance can play for improving SGIs contribution towards the EU social objectives
 - 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 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.

Please refer to the subcontractor terms of reference (Section 3 above) for a more detailed description of the experts' tasks and deliverables.

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 the Sustainable Finance Framework as well as the EU Social Taxonomy
- Knowledge on the Action Plan on the European Pillar of social Right
- Understand the framework and theory on non-financial reporting of activities
- 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 € 82.000,00 (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 82,000 (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 henriette.gleau@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