



Tender Specifications
for subcontracting external expertise *

INTEGRATED PROGRAMME of the EU Social Dialogue 2013-14
“A toolkit for Gender Equality in Practice”

Date of publication on the ETUC, BUSINESSEUROPE, CEEP and UEAPME websites:	5 September 2012
Deadline to respond:	10 October 2012 <i>7pm Brussels time</i>

** Under reserve of acceptance of the project by the European Commission*

Content

1	BACKGROUND	2
1.1	Introduction	2
1.2	Objective	2
1.3	Method	3
1.4	Activities	4
1.5	General organisation and description of project partnership	5
2	PURPOSE OF THE TENDER	5
3	TASKS TO BE PERFORMED BY THE SUBCONTRACTOR	5
4	EXPERTISE AND EXPERIENCE REQUIRED.....	7
5	TIME SCHEDULE AND REPORTING.....	7
6	PAYMENT	7
7	PRICE.....	8
8	SELECTION CRITERIA	8
9	AWARD CRITERIA.....	9
10	CONTENT AND SELECTION OF THE BIDS	9
11	ANNEXES.....	10

1 BACKGROUND

1.1 Introduction

The European social partners ETUC, BUSINESSEUROPE, CEEP and UEAPME have undertaken to develop a joint project entitled "A toolkit for gender equality in practice".

They have therefore responded to a call for proposal of the European Commission (Budget Line 04-03-03-01) to obtain the necessary funding in order to be able to carry out their action, with a final decision expected in November 2012.

In the framework of this call, they express their intention to select a subcontractor.

This call for tender describes the subcontracting work needed to carry out this 18-month joint project.

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

1.2 Objective

The overarching objective is to launch a toolkit built on successful experiences identified at enterprise level in the implementation of the Framework of actions on Gender Equality.

A large part of the rationale of this action is to look at the examples reported in the 2009 final evaluation report of the Framework of Actions¹, update them and promote them further. All sectors and sizes of enterprises should be represented, and if possible across the European Union. It is anticipated that new examples could also be identified and promoted.

This proposal specifically seeks, through the help of a subcontracted expert, to help EU SPs' organisations to:

- Work internally with the EU SPs affiliates on the four priorities with a focus on the remaining inequalities between women and men. A focus will be put on practices/cases aiming to address the gender pay gap;
- Map successful experiences at company level;
- Look at the existing final evaluation report and enlarge/update the practices/cases;
- Categorize the examples so that they are usable, comprehensive and result oriented;
- Create and design a user-friendly web-based toolkit to be embedded in the online resource centre websites
- Produce a video;
- Produce a brochure (8 pages in all EU languages) presenting general information and introducing the toolkit including the link to the resource centre websites;
- Organise an EU-level conference on 7 March 2014 for the launching of the toolkit and the video.

¹ The 2009 evaluation report and related documents can be downloaded either from the Employers Resource Centre (<http://www.erc-online.eu/content/default.asp?PageID=511>) or from the Trade Unions Resource Centre (<http://resourcecentre.etuc.org/Frameworks-of-actions-56.html>).

1.3 Method

1. First phase: desk-research

The first phase will be entrusted to the subcontracted expert working under the supervision of a small steering committee in accordance with the methodology and the call for tender specifications.

After a first kick-off steering committee meeting of partners together with the subcontracted expert to be held in Brussels in December 2012 / January 2013, the first stage of the project will be to start mapping out experiences at company level, based on the four priorities of the Framework of Actions and on the practice/case presented in the final evaluation report.

If possible, all 27 Member States and enterprises of all sizes will be represented.

A second steering committee meeting, to take place in Brussels no later than May/June 2013 with partners together with the subcontracted expert, will be organised in order to take stock of practices/cases available and decide on a methodology for action when it comes to the promotion and dissemination in the form of an online toolkit.

Partners will jointly decide at this stage, together with the subcontracted expert the scope, format of the toolkit and the content of the video. The subcontracted expert will propose different options to the partners.

The subcontractor will have to make clear in the bid who will provide the expertise on the content (knowledge on gender equality) and regarding communication tools (toolkit design, web interface, and dissemination).

2. Second phase: creating and designing a web-based toolkit; producing a video

During this phase, the subcontracted expert will design and present to the partners a web-based tool that will be available for the public, aiming at putting together the 80-100 practices/cases identified.

The online toolkit must have the following features:

- Simple and user-friendly;
- Focused on the four priorities, including the gender pay gap;
- Be embedded in the respective employers' and trade unions' online resource centres.

Technical and legal requirements will be considered as key components of the toolkit. The ultimate owners of this web-based tool will be the European social partners.

The project will allow the subcontracted expert to conduct a limited number of field interviews to promote the work of company social partners (including unilateral activities) on gender equality in the video. The choice of enterprises to be visited will be decided among partners together with the subcontracted expert. A travel fund for up to six 2-day trips will be available for the subcontracted expert. It is foreseen that the subcontracted expert will travel with one cameraman and one assistant (3 people in total).

The brochure should also be finalised during this second phase.

3. Third phase: EU-level Conference on 7 March 2014

The one-day conference is scheduled to take place on 7 March 2014 in Brussels, on the eve of the International Women's Day (8 March). The objective of this event will be to launch officially the toolkit, present the practices/cases, the video and the brochure.

It will be foreseen that a total of 100 participants from all 27 EU Member States and candidate countries would attend this one-day conference. Company representatives, experts and representatives from the European Commission will also be invited to participate.

This conference also aims at building awareness among ETUC, BUSINESSEUROPE, CEEP and UEAPME members, and also national social partners to act with concrete solutions on gender equality, based on the main messages around the four priorities of the Framework of Actions. It will also aim at disseminating best practices on a wider scale thanks to the use of the video.

BUSINESSEUROPE will be in charge of the organisation of this conference.

1.4 Activities

A short description of the main features of the project follows:

One-day Brussels-base "Kick-off" Steering Committee Meeting

- 10 participants
 1. 8 EU secretariats
 2. 2 expert coordinators
- Date: December 2012/January 2013.

Four further 1-day Steering Committee meetings are foreseen in Brussels with the same format:

- one meeting after desk research (May/June 2013)
- one meeting before the finalization of the toolkit (October/November 2013)
- one meeting before the EU-level conference (January/February 2014)
- one concluding meeting (April 2014).

One Travel Fund

A travel fund for up to six 2-day trips in Europe will be available for the subcontracted expert to conduct interviews for the production of the video. It is foreseen that the subcontracted expert will travel with one cameraman and one assistant (3 people in total).

One-day Brussels-based EU-level conference

- 100 participants from EU 27 and candidate countries
 - 20 case study representatives (speakers + participants from selected cases)
 - 68 national social partners (34 trade unionists, 34 employers)
 - 8 EU secretariat
 - 1 expert coordinator
 - 3 guest experts
- Date: 7 March 2014.

1.5 General organisation and description of project partnership

This action will be managed by BUSINESSEUROPE (on behalf of the four EU social partners organisations ETUC, BUSINESSEUROPE, CEEP and UEAPME), under the supervision of a steering committee composed of representatives of the four partners, namely: ETUC, BUSINESSEUROPE, CEEP and UEAPME. In addition, the partners will provide expertise for the project components, the EU-level conference and the steering committee meetings in Brussels.

For the implementation of this project, an expert will be contracted for an estimated 60 (sixty) days' expertise:

- He/she is responsible for the planning of the three phases of the project, including the general coordination with the project partners and insuring that budgets and deadlines are respected;
- He/she will apply wherever possible a balanced approach when identifying and proposing cases in line with the different partners objectives.

Please refer to the subcontractor terms of reference (Section 2 onwards) for a more detailed description of the experts' tasks and deliverables.

The project accounting and production of the final report for the European Commission will be carried out by BUSINESSEUROPE.

2 PURPOSE OF THE TENDER

The tender aims at finding a subcontractor to carry out the joint project of the European social partner organisations entitled "**A toolkit for gender equality in practice**".

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 35 (thirty five) days on their respective websites.

3 TASKS TO BE PERFORMED BY THE SUBCONTRACTOR

The subcontractor should provide the following services for the applicant organisations:

- During the first phase:
 - o Propose a detailed action plan during the first Steering Committee meeting (kick-off), including the timeframe and planning of activities, to be validated by the partners,
 - o Present the detail of the methodology as indicated in the bid regarding the responsible staff and/or supplier for the design the web-based toolkit, the production of the video and the editing/printing of the brochure;
 - o Map relevant practices at the workplace, based on a detailed action plan;
 - o Produce a detailed support document and database to keep track and assemble the relevant practices and in order to prepare for the second phase. All technical documents used and reviewed should be appended;
 - o The expert will have or develop an in-depth knowledge of both 2005 Framework of Actions and 2009 Final Evaluation Report;

- Organise one Steering Committee meeting at the end of this phase, in close coordination with BUSINESSEUROPE's Project Administrator.
- During the second phase:
 - Follow the entire development phase of the project deliverables, including adopting a coherent approach where all materials are easy to use. This will include the proposal of a comprehensive communication plan (choice of colours, images, logo, etc);
 - Coordinate with the partners, the responsible staff and/or supplier the design the web-based toolkit, the production of the video and the editing/printing of the brochure;
 - Insure that online deliverables are adapted to existing websites (Employers Resource Centre and Trade Unions Resource Centre) and that prices meet budget constraints;
 - He/she will have at his/her disposal the possibility to undertake up to six 2-day trips funded visits to certain countries to organise face-to-face interviews for the video. The expert will be responsible for the planning and organization of the travels required to run the interviews (to be used in the video), including the validation of cases with the partners and a detailed reporting of experiences;
 - Start organising the EU-level conference by proposing a detailed agenda and help in the selection of a conference venue;
 - Organise two Steering Committee meetings (one "intermediate" and the second one at the end of this phase), in close coordination with BUSINESSEUROPE's Project Administrator.
- During the third phase:
 - The expert will be responsible for the finalisation of all project deliverables, including the testing of the web-based toolkit;
 - Advise on the choice of guest speakers to be invited, case studies to be presented;
 - Animate the conference and contribute to organise the moderation of the discussions in order to ensure an interactive nature of this exercise, including receiving questions from the audience;
 - Draft a post conference report of proceedings (max. 10 pages);
 - Liaise with the steering committee when coordinating with speakers the content of presentations / interventions in line with the rationale of the conference;
 - Finalise all conference materials;
 - Ensure that the final outcomes can be used as to be disseminated widely, providing technical and practical approach, to be user friendly and in line with the overall objective of the project;
 - Organise one final Steering Committee meeting, in close coordination with BUSINESSEUROPE's Project Administrator.

The subcontracted expert will be responsible for proposing an agenda for each Steering Committee meetings and will draft the summary of conclusions. Both the agendas and the summary of conclusions will be validated by the partners.

4 EXPERTISE AND EXPERIENCE REQUIRED

Subcontractor

Sound experience is required in the following areas:

- Successful track record in delivering research-based projects over a long time frame (12+ months);
- Ability to formulate and carry out a tailored methodology involving a variety of actions (i.e. mapping of practices, communication tools, European events);
- Coordinating, running and animating large-scale international events (of up to 100 participants), preferably on the issue of gender equality;
- Strong project management and planning skills;
- Reporting skills (in English);
- Ability to work within specified deadlines and to respect budgetary limits.

Sound expertise is also required on the following issues:

- Knowledge of social dialogue systems and labour market issues in member states and at EU level;
- Ability to inform and analyse gender equality issues identified at the workplace.

5 TIME SCHEDULE AND REPORTING

The subcontractor will be asked to work from 01 December 2012 to 31 May 2014.

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

The subcontractor will be asked to work 60 (sixty) days, of which:

- 6 days are dedicated to attendance of the steering meetings (5 days) and EU-level conference (1 day);
- 12 days ("six 2-day trips") are dedicated to conduct the visits in certain countries to organise face-to-face interviews for the video;
- 14 days are considered necessary for the first phase of the project;
- 14 days are considered necessary for the second phase of the project;
- 14 days are considered necessary for the third phase of the project.

6 PAYMENT

The total maximum budget available for expertise is as follows:

Contract with BUSINESSEUROPE
<ul style="list-style-type: none">➤ Steering Committee meeting # 1 (kick-off)➤ First phase, background research and desk research➤ Steering Committee meeting # 2➤ Second phase, video, interviews, project deliverables development➤ Steering Committee meeting # 3

<ul style="list-style-type: none"> ➤ Second phase, finalisation of project deliverables ➤ Steering Committee meeting # 4 ➤ Third phase, EU-level conference ➤ Steering Committee meeting # 5 (final) 		
Daily rate	Days of work	€
€ 550	x 60 days	33,000
TOTAL € 33,000		

In accordance with the above table, the subcontractor will enter into a contract with **BUSINESSEUROPE** for a total of € 33,000 (all taxes included).

The subcontractor will receive an advance, interim and final payment.

7 PRICE

Contract with **BUSINESSEUROPE:** € 33,000.

TOTAL: **€ 33,000.**

8 SELECTION CRITERIA

The offers will be examined against the following criteria:

- Ability to formulate and carry out a tailored methodology involving a variety of actions (i.e. mapping of practices, communication tools, European events);
- Experience in coordinating, running and animating large-scale international events, preferably on the issue of gender equality;
- Successful track record in delivering research-based projects over a long time frame (12+ months);
- Project management experience are essential requirement;
- Communication credentials;
- Expert knowledge of gender equality, labour market issues, and social dialogue at national and EU level;
- Experience in working with social partners organisations at EU and national levels is an asset;
- 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 conduct meetings and draft all documents in English;
- Proven track record of ensuring the quality of written materials prepared, both in terms of content and format (i.e. deliver publishable documents, presentation of cases, images and logos, etc.);
- Presence in the bid of the methodology regarding the responsible staff and/or supplier for the design the web-based toolkit, the production of the video and the editing/printing of the brochure;
- Good administrative skills;
- Respect of deadlines;

- Respect of the budgetary constraints.

9 AWARD CRITERIA

The contract will be awarded to the tender offering the best value for money, taking into account the specific object, requirements and selection criteria of the tender. The principles of transparency and equal treatment will be respected with a view to avoiding any conflicts of interest.

10 CONTENT AND SELECTION OF THE BIDS

Offers must be received within 35 (thirty five) days of the date of publication of this call for tender on the partners, by 10 October 2012. Offers must be to BUSINESSSEUROPE (see contact address below).

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.

This report will include:

1. The name and address of the contracting authority, the purpose and value of the contract or framework contract;
2. The names of any excluded candidates and the reasons for their rejection;
3. The names of candidates selected for consideration and the justification for their selection;
4. The names of candidates put forward and justification of their choice in terms of the selection or award criteria.

The contracting authorities will then make their decision.

All candidates must either deliver their bid by hand or submit them by registered letter to:

BUSINESSEUROPE
Maxime Cerutti
Director
Social Affairs Department
Avenue de Cortenbergh 168
B – 1000 Brussels
BELGIUM

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

11 ANNEXES

- Detailed project description