

Call for tenders for subcontracting expertise – ETUC project on ETUC SEMESTER 2.0 - Enabling a trade union influential presence in the EU semester

This is a call for a subcontractor to provide IT support as part of the implementation of the ETUC project on “ETUC SEMESTER 2.0 - Enabling a trade union influential presence in the EU semester”.

SUB-CALL 1 – DESIGNING WEB APPLICATIONS FOR GATHERING AND ELABORATION OF QUALITATIVE AND QUANTITATIVE INFORMATION

SUB-CALL 2 – IMPROVING COMMUNICATION BETWEEN THE ETUC AND ITS AFFILIATES

In order to ensure a large visibility of this call for tender, the ETUC will publish the tender specifications on its website, on Monday 11 April 2016, and keep it online for 4 weeks (deadline for submission of bids: Monday 9 May 2016).

1. Summary of the project and description of the objective

The European Semester is a process of working through which the governments of Member States coordinate their economic policies. The European Semester is just one of the processes that relate to economic governance of European Monetary Union, although the only one deployed on regular and predictable basis as it refers to situations of stability or convergence of countries in regard of the macroeconomic constraints of the euro. Other procedures involve the temporary and remedial situations, although treated with standardized procedures but not cyclical.

The European Semester is cyclical. In the course of the years the European Commission, responsible for the proper implementation of the cycle, made efforts to standardize the process by exploiting its regular and predictable timeline.

The ETUC needs web-based applications aimed at maximising its internal resources in order to establish a constructive dialogue with the European Commission in the framework of the so called European Semester. As priorities the ETUC wants to enhance its influential presence in the European Semester during the following phases

- Development of Broad Economic Guidelines (Annual Growth Survey, Employment Report and Alert Mechanism Report)
- Development of Country Reports

- Monitoring of the role of the social partners in the definition of national reform plans and of trade union fundamental rights in Europe
- Amending the CSR.

To this end, the ETUC intends to develop its own methodology “ETUC SEMESTER 2.0”.

As part of its action the ETUC feels the need to strengthen the following aspects:

- Participation: Number of member organizations active in the methodology and intensity of information flows to-and-from Brussels.
- Ownership: awareness among participants in the methodology and its implications
- Effectiveness: meaning the ability to collect and process the information gathered with available resources
- Transparency: accessibility of information collected, processed and reported in the context of the methodology
- Accountability: verifiability of the information conveyed and actions undertaken with respect to both the mandate received and consistency of the positions expressed.

Its strategy has to be strengthened especially in the drawing up the documents, in the conveyance of the information provided to the European institutions and for a permanent monitoring of the involvement of its members in national phases of the European Semester.

In order to achieve its objectives, the ETUC needs

- SUB CALL 1: Expertise to develop applications to improve collection of national inputs regarding national policies in a situation of high variability of contents, and to optimize the reporting process and applications for monitoring of national practices defined with data suitable for quantitative-data analysis.
- SUBCALL 2: Support for improving the use of web-based communication tools. The subcontractor will be asked to produce proposals for a web-based communication platform including communication and dissemination of the ETUC outputs in the framework of ETUC Semester 2.0 methodology.

For that purpose, the ETUC invites to submit offers to interested parties to participate in one or both the following sub-calls:

SUB-CALL 1 – DESIGNING WEB APPLICATION FOR GATHERING AND ELABORATION OF INFORMATION

a) Optimize the process of gathering information in text format and automatic generation of reports (without further elaboration of the texts gathered)

b). Organize the collection of information of observable events in the form of data for further processing in order to obtain a quantitative description of the events.

SUB-CALL 2 – IMPROVING COMMUNICATION BETWEEN THE ETUC AND ITS AFFILIATES

Strengthening communication toward and from the national levels through www.etuc.org site by optimized and upgraded web design functions

The document annexed to this call (titled “**ETUC instruments to evaluate the best technology to design a web portal, including internet-based applications, which suit ETUC needs**”), provides further elements specifying the tenderer’s needs and must be considered as an integral part of this tender.

Each applicant can submit offers to one or both sub-calls. In case an applicant wishes to participate in both sub-calls, it has to provide two distinct offers.

2. Tasks to be performed by the subcontractor

SUB-CALL 1 – DESIGNING WEB APPLICATION FOR GATHERING AND ELABORATION OF INFORMATION

- Development of an application that allows the collected input in text format to a more orderly and rapid arrangement of texts in a single report. The latter has to be readable online or can be downloaded in pdf format.
- B. Creating a source-document template working off-line but able to feed an online database and able to generate automatic reports.
- Application to collect information concerning observable events that can be treated as numeric data and then analyzed in quantitative or statistical terms.
- Generation of info-graphics and visual reporting of collected data.

SUB-CALL 2 – IMPROVING COMMUNICATION BETWEEN THE ETUC AND ITS AFFILIATES

The subcontractor should provide the following services for the ETUC:

- Designing a web based communication tool to improve communication between ETUC and its affiliates in the implementation of the ETUC methodology to cope with the European Semester
- Make use of web-based tools to improve access to documents related to the economic governance of the EMU
- The definition of a dedicated area of www.etuc.org portal, having in mind that this area has to accommodate - or make available - more complex instruments for collecting, sharing and processing of information or data, necessary to achieve the objectives of the ETUC methodology.

Please refer to the annex document **ETUC instruments to evaluate the best technology to design a web portal, including internet-based applications, which suit ETUC needs**, for further specifications.

3. Expertise, experience and skills required

Expertise and skills:

CALL 1: **DESIGNING WEB APPLICATION FOR GATHERING AND ELABORATION OF INFORMATION**

Expertise and skills

- Capacity to design applications to collect and elaborate information in text format
- Capacity to elaborate applications to collect and elaborate quantitative data
- Capacity to elaborate applications to auto-generate graphical and visual reporting of quantitative data
- Capacity to design application that can be made operational in web-based communication tools

CALL 2: **IMPROVING COMMUNICATION BETWEEN THE ETUC AND ITS AFFILIATES**

- Capacity to elaborate and design tailor-made web-based communication solutions;
- Previous experience of cooperation with trade unions or similar organisations;
- Experience in developing web-tools in multilingual environments;

4. Time schedule and reporting

Subcontractors will be asked to attend a meeting with the ETUC staff on the 16th of May.

The subcontractors will be asked to produce firstly a project study by **30th of June 2016**, in time to allow the formulation of recommendations by the project advisory committee.

The subcontractor will be asked to produce the alfa version of their output by **September 2017**, in time to allow the formulation of recommendations by the project advisory committee.

The subcontractor will attend 5 meetings of the steering/advisory group, which will be held **between November 2016 and December 2017**.

5. Payment

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

Contract with ETUC
Main activities <u>SUB-CALL 1</u>

<ul style="list-style-type: none"> ▪ Meeting with the ETUC staff ▪ Project of output ▪ Alfa Version ▪ Final version 	
Total budget for the Expertise	€
	25.000 € (all taxes included)
Main activities <u>SUB-CALL 2</u>	
<ul style="list-style-type: none"> ▪ Meeting with the ETUC staff ▪ Project of output ▪ Alfa Version ▪ Final version 	
Total budget for the Expertise	€
	5.000 € (all taxes included)

The subcontractor(s) will be remunerated in various instalments (advance and final payment). This amount does not include the travel and subsistence costs incurred for attending meetings. These will be covered by ETUC on the basis of EU rules & thresholds.

6. Selection criteria

The selection criteria are:

- Verifiable expertise, experience and skills, as required and described in part 4 of this call;
- Proven track record of ensuring the quality of output 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;
- Previous work undertaken in the concerned field of communication and development of internet-based communication tools or applications.

7. Form, structure and content of the tender

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.

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 performed by all the experts involved, in relation to the relevant tasks specified in this tender.

- Specific information concerning the proposed methodology for delivering the tasks listed in part 3.

ii) Financial proposal

Prices of the financial proposal must be quoted in euros, including if the sub-contractor is based in a country which is not in the euro-area. As far as the tenderers of those countries are concerned, they cannot change the amount of the bid because of the evolution of the exchange rate. The tenderers choose the exchange rate and assume all risks or opportunities relating to the rate fluctuation.

Prices must be fixed amounts and shall not include travel expenses for attending the project meetings (which will be covered by ETUC on the basis of EU rules & thresholds).

The maximum amount available for this contract is

CALL 1: EUR 25,000 (all taxes included)

CALL 2: EUR 5.000 (all taxes included)

Prices shall be fixed and not subject to revision during the performance of the contract.

8. Award Criteria

The contract will be awarded to the tender offering the best value for money, taking into account the specific objectives, 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.

9. Content and selection of the bids

This call for tenders will be published on the ETUC website on Monday 11 April 2016. Offers must be sent within 4 weeks of the date of publication, by Monday 9 May 2016. Offers must be sent to ETUC,

in both formats: electronic (by e-mail to amartin@etuc.org) and as a paper copy, either delivered by hand or by registered mail or special courier service to:

ETUC

Veronica NILSSON

Confederal Secretary

International Trade Union House

Boulevard du Roi Albert II, 5

B – 1210 Brussels

BELGIUM

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

Concerning the paper copy, to ensure confidentiality, bidders must submit their offer in a double envelope. Both envelopes must be sealed and the inside envelope shall not only bear the words "ETUC SEMESTER 2.0 Project – 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 of 3 representatives of the ETUC Secretariat. One or more members of this committee will initial the documents, confirming the date and time of each bid. The committee members will sign the report on the bids received, which will list the admissible bids and provide reasons for rejecting bids owing to their failure to comply with the stipulations of the tendering process.

This committee will also evaluate the tenders that have been deemed admissible. An evaluation report and classification of participation requests will be drawn up, dated and signed by all the members of the evaluation committee and kept for future reference.

The contracting authorities will then make their decision.