



**PROJECT IN RESPONSE TO THE OPEN CALL VP/2018/001 UNDER BUDGET HEADING 04.03.01.08**

**TENDER SPECIFICATIONS FOR SUBCONTRACTING EXTERNAL EXPERTISE**

***EU Sectoral Social Dialogue Project VS/2019/0034***

## **Social Innovation in the temporary agency work industry**

1<sup>st</sup> February 2019

### **1. Background**

The World Employment Confederation-Europe and UNI Europa, the two EU sectoral social partners of the temporary agency work sector decided jointly to respond to the call for proposals VP/20018/001, budget heading 04.03.01.08 – Support for social dialogue.

The World Employment Confederation-Europe and UNI Europa, in the context of their updated work programme for the sectoral social dialogue on temporary agency work and as part of this joint project would like to conduct a field research on “Social Innovation in the temporary agency work industry”. A project grant agreement was signed between the European Commission, Director for Employment, Social Affairs and Inclusion and the World Employment Confederation-Europe in January 2019.

The World Employment Confederation-Europe and UNI Europa are responsible for managing and implementing the project and will work closely with the selected researcher.

### **2. About the research**

Social innovation is a key component of the changing world of work and a tool to establish futureproof, better functioning labour markets. Social innovation can be related to skills enhancement and training, helping people to acquire the skills they need to succeed in the labour market, to modern social protection schemes that allow for the transferability and portability of rights, new safety nets that are

established via bipartite funds and bodies and collective bargaining / sectoral social dialogue. The World Employment Confederation-Europe and UNI-Europa have touched on these aspects in previous joint projects, such as the project on comparing temporary agency work with other forms of employment or the project on “Online talent platforms, labour market intermediaries and the changing world of work”. Joint recommendations have been adopted by the sectoral social partners linked to each of their recent joint projects.

“Social innovation is the implementation of new strategies in the field of working, learning and social protection to meet both employers and workers’ needs.” The policy concept of social innovation is closely linked to recent, EU social policy initiatives, such as the European Pillar of Social Rights, the Commission proposal for a Directive on transparent and predictable working conditions and the Commission proposal for a Council Recommendation on access to social protection for workers and self-employed.

### 3. Presentation of the overall project

The project includes the research carried out by the external contractor, three thematic workshops on social innovation practices in the temporary agency work industry, the EU stakeholders’ meeting with dialogue with representatives of the temporary agency work industry to identify social innovation practices and a pan-European conference. The action will be developed in different phases explained below. Based on the preliminary discussion between social partners, social innovation in the temporary agency work industry is present in many different dimensions (skills enhancement and training policies, working conditions and social protection as well as collective bargaining and social dialogue etc.). Given the role of temporary agency work and its multi-sectoral approach (assigning workers to many different economic sectors and professions), the research will clearly have a multi-dimensional and multi-sectoral dimension. Furthermore, preliminary investigations show that social innovation practices have been developed in many European countries, which shows the clear cross-national dimension of the project.

#### **Phase 1 – preparation and launch of the research (months 1-2)**

In this phase, the World Employment Confederation-Europe and UNI Europa will take all the necessary steps to launch the research. Notably, they will:

- Set-up of a core working group between the two secretariats, the World Employment Confederation-Europe and UNI Europa, to closely follow and coordinate the project. The members of this working group can be up to 2 per each social partner and are based in Brussels.

- Draft and publish the call for tenders to subcontract the research. An external research team will support the sectoral social partners to sum up the social innovation practices presented during several workshops and to compile the compendium that will be presented during a concluding, pan-European Conference.
- Review the applications received and select the most suitable proposal
- Set-up of a Steering Committee made of 3 members from each partner. The Steering Committee will provide guidance and direction to the inventory of social innovation practices and will meet 4 times throughout the project. The core working group of the two secretariats will also take part in the Steering Committee meeting.
- Definition of the methodology of research and data gathering
- First meeting of the Steering Committee to agree on the methodology and on the direction of the research. The research institute will also take part in the first meeting.
- Call to World Employment Confederation-Europe and UNI Europa members to provide case studies and examples to contribute to the research.

## Phase 2 – Social Innovation in access to training (months 3 – 5)

In this phase, the researcher will focus on the first dimension of social innovation, namely on approaches to enable access to training, gathering experience, practices and data from the temporary agency work sector. This information gathering will form the core of one chapter of the compendium, looking at social innovation in access to vocational training. Steps in this phase include:

- Gathering of relevant data, case studies and examples based on desktop research.
- The researcher reach out the bipartite training funds to gather information on access to training for temporary agency workers and socially innovative practices
- A special focus will be laid on apprenticeships and dual learning in the temporary agency work as an example of social innovation.
- Preparing 5-6 concrete national social innovation case studies illustrating social innovation in access to training for temporary agency workers
- Compilation and analysis of the information collected.
- Drafting of a compendium of social innovation practices in the area of access to training.
- Second meeting of the Steering Committee will take place in phase 2 to take stock of the progress in the research process and provide guidance for the next steps.
- Linked to the second steering committee, a first Social Innovation workshop will be held, involving industry experts in the area of training for agency workers to provide input and feedback on the findings and conclusions on social innovation in access to training.

### **Phase 3 – Social innovation in ensuring appropriate working conditions and social protection, Brussels (month 6 - 8)**

In this phase, a second dimension of social innovation will be explored, namely social innovation in securing appropriate working conditions and social protection. A special focus will be laid in this context on innovative practices in securing the transferability and portability of rights, which is ensured in the temporary agency work industry via bipartite funds and individual accounts for social benefits. In this phase, the following steps will be taking:

- Gathering of relevant data, case studies and examples on appropriate working conditions and access to social protection based on desk research
- Reaching out to the bipartite social funds and pension funds set up in the temporary agency work sector to ensure social protection and appropriate working conditions
- A special focus and attention to models set up in the Member States and by social partners to ensure the transferability and portability of rights
- Preparing 5-6 concrete social innovation case studies on social innovation to ensure appropriate working conditions and social protection
- Third meeting of the Steering Committee will take place to assess the social innovation practices and to review the case studies identified. The Steering Committee will also provide guidance on the next steps in the research process.
- Linked to the third steering committee, a second Social Innovation Workshop will be held, involving industry experts in the area of social protection and working conditions to present findings and conclusions on social innovation in working conditions and access to social protection.

### **Phase 4: The role of social partners and collective bargaining in fostering social innovation in the temporary agency work sector (months 9 – 11)**

The fourth phase of the project will look into the role of social partners, social dialogue and collective bargaining in fostering social innovation in the temporary agency work sector. In this phase, the following steps will be taken:

- Gathering the relevant data, case studies and examples of sectoral social dialogue outcomes and practices that helped fostering social innovation
- Analysing the framework conditions and supporting factors that foster social innovation through collective bargaining and social dialogue
- Establish contacts to selected social partners at national level to learn about their social innovation practices

- Comparing and mapping the EU Member States and the practices of the sectoral social partners with regard to social innovation practices to create a social innovation index
- Preparing 5-6 case studies on the role of social partners and collective bargaining in driving social innovation.
- A Social Innovation Workshop on the role of social dialogue and collective bargaining in fostering social innovation will be held to present and discuss the practices identified.

In phase 4, there will be the European stakeholders meeting in Brussels where the researcher and social partners will present the preliminary findings and will get input and comments to enrich and adjust the research before its finalisation.

- Organise a meeting with the key European stakeholders in Brussels to discuss and exchange views on the preliminary findings of the research.
- Around 25 relevant key European stakeholders, including (when possible) representatives/stakeholders from social innovation practices (access to training, working conditions and social protection, collective bargaining), European Commission, Academics, and practitioners etc. will come together to engage in an interactive debate on the topic of the action.
- The Steering Committee Members will take part in the interactive exchange of views with the European stakeholders meeting.

The proposed draft programme for the meeting is outlined below:

11:00 – 11:30	Welcome of participants & lunch
11:30 – 12:00	Presentation of the joint project by WEC-Europe and UNI Europa
12:00 – 13:00	Presentation of the state of play and preliminary results of the study by the researcher
13:00 – 14:00	Exchange of views and feedback from EU stakeholders on field research
14:00 – 14:30	Coffee Break
14:30 – 15:30	Discussion on specific social innovation case studies
15:30 – 15:45	Concluding remarks
15:45 – 16:00	Next Steps <ul style="list-style-type: none"> <li>- Pan-European conference, tbd</li> <li>- Online publication</li> </ul>
16:00	End of meeting

### Phase 5 – Finalisation of the report (months 12-14)

The report will be finalised in this phase and will be circulated to World Employment Confederation-Europe and UNI Europa respective national members to check the content and get their final remarks.

A fourth meeting of the Steering Committee will be held to discuss and approve the content of the research and the compendium of social innovation practices.

The researcher, based on the final report, will prepare an executive summary with the key findings and the social innovation practices.

The executive summary will be translated in this phase into one further language (French or German) in addition to English, the language in which it will be originally written.

### Phase 6 – Launch of the report at the pan-European conference (months 15)

A one-day pan-European conference will be organised in Brussels to present the main outcomes of the project and the case studies. This will be the basis for discussion between social partners, policy makers and key stakeholders on social innovation practices in the temporary agency work sector and its impact on the overall labour market. Around 70 participants are expected.

Discussion and exchange at the pan-European conference will offer a forum for the temporary agency work social partners to put forward a joint declaration or joint recommendations on social innovation in the temporary agency work sector. The proposed draft programme of the pan-European conference is outlined below:

11:00 – 11:30	Welcome coffee & registration
11:30 – 12:00	Opening of Conference by the World Employment Confederation-Europe and UNI Europa Keynote speech from EU Commission, DG EMPL
12:00 – 13:00	Presentation of the key findings of the final report by the external researcher
13:00 – 14:30	Lunch break
14:30 – 15:00	Panel discussion with representatives of social innovators innovation practices researched Exchange of views and discussion with the floor
15:00 – 15:45	Presentation of recommendations from the World Employment Confederation-Europe and UNI Europa and discussion
15:45 – 16:00	Concluding remarks and end of meeting

### **Phase 7 – Dissemination of the results (months 16-17)**

In this phase, the World Employment Confederation-Europe and UNI Europa will disseminate the results of the final report and will follow-up on the conclusions of the pan-European conference.

A final document comprised of the research report, the compendium of social innovation practices and the presentations given during the conference, and (if agreed upon) the recommendations issued by the social partners will be produced. It will be published online on both World Employment Confederation-Europe and UNI Europa's websites as well as distributed internally to all their national members.

The proceedings of the conference, the main findings of the research and the key recommendations launched at the pan-European conference will be also sent to the key national and European stakeholders (e.g. national bipartite training funds, European Commission, MEPs interested in the topic, academics).

An executive summary of the final report together with the joint recommendations will be printed out for the English version. The translated version will be available on line and put on World Employment Confederation-Europe and UNI Europa's websites.

### **Phase 8 – Reporting and closing of the action (month 18)**

In this phase, the World Employment Confederation-Europe and UNI Europa will take care of the final reporting about the progress of the action and will provide the European Commission with all the necessary documents to close the project, in accordance with the guidelines set out in the call for proposals and in the grant agreement.

## **4. Purpose of the contract**

As neither the World Employment Confederation-Europe nor UNI Europa have the capacity to carry out such a research project without an external partner, they need to request support of external expertise.

The external expert(s) will be responsible to carry out the research project as described above, to write a full report, including the compendium of social innovation practices and an executive summary and to participate in and present findings at relevant meetings and events linked to the action.

This work will be undertaken under the supervision of and in cooperation with the World Employment Confederation-Europe and UNI Europa.

## 5. Tasks to be performed by the contractor

The researcher will have to conduct a comparative research on social innovation in the temporary agency work industry. The research should provide, in cooperation with experts of the temporary agency work sector, quantitative and qualitative data on the various dimensions presented in section “2. About the research”.

The research should have a European/transnational perspective and should put forward input for the compendium of social innovation practices, showcasing national social innovation practices in the area of access to training, in ensuring appropriate working conditions and social protection as well as the of social dialogue and collective bargaining in fostering social innovation.

The contractor should define the methodology of the research as well as information gathering from World Employment Confederation-Europe and UNI Europa’s members and external sources. Data that comes from bipartite sources and research should be privileged for the purpose of the research.

The contractor should draft the final report, the compendium of practices and the executive summary, containing the key findings and social innovation practices.

The contractor should attend the steering committee meetings, the EU stakeholders’ meeting and the final pan-European conference. The contractor shall also provide an updated on the state of paly of the project when necessary during the EU Sectoral Social Dialogue Committee meetings. All of these meetings will be held in Brussels.

The contractor should be able to present the findings of the research at the EU stakeholders meeting and pan-European conference.

English will be the working language of the whole project. However, it is expected knowledge of French, German, Dutch, Italian and Spanish to analyse and compile data from national members’ databases.

It will be key to take into account the expectations and views of both parties (employers and workers) in the project, in order to find balanced position on the topic.



## 6. Expertise required

The contractor will have to demonstrate to:

- Be able to work in English (fluency in oral and written English) to write the report, participate at the meetings and present at the relevant meetings and at the pan-European conference;
- Be able to work in French, German, Dutch, Italian and Spanish to compile data from the World Employment Confederation-Europe and UNI Europa's national members;
- Have background experience/references in the topic of the research;
- Have experience in the European Social Dialogue;
- Have already conducted similar research in the same field and has a knowledge of the temporary agency work sector;
- Have experience in projects carried within the framework of EU Commission budget heading 04 03 01 08 Industrial relations and social dialogue;
- Be able to work in a multinational project team.

## 7. Time schedule and reporting

The research be conducted over 18 months starting from the months following the signature of a grant agreement. Deadlines to be met for producing documents are mentioned in the table below.

### TIMEFRAME OF THE ACTION

MONTHS	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18
<b>Phase 1 – Preparation of and launch of the research</b>																		
Selection of a research institute	X	X																
Setting up of the Core working group	X	X																
Setting up of the Steering Committee	X	X																
Definition of the methodology of research		X																
1 <sup>st</sup> meeting of the Steering Committee		X																
Meeting with the selected research body		X																

MONTHS	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18
<b>Phase 2 – Social Innovation in access to training</b>																		
Collection of data			X	X	X													
Compilation and analysis of data collected			X	X	X													
Draft of a chapter for the report			X	X	X													
Identification of 2-3 case studies			X	X	X													
2 <sup>nd</sup> meeting of the Steering Committee				X	X													
<b>Phase 3 – Social innovation in ensuring appropriate working conditions and social protection</b>																		
Collection of data						X	X	X										
Compilation and analysis of data collected						X	X	X										
Draft of a chapter for the report						X	X	X										
Identification of 2-3 case studies						X	X	X										
3 <sup>rd</sup> meeting of the Steering Committee							X	X										
<b>Phase 4 – The role of social dialogue and collective bargaining in fostering social innovation</b>																		
Collection of data									X	X								
Compilation and analysis of data and examples collected									X	X	X							
Third Social Innovation Workshop “Role of Social Dialogue and Collective Bargaining												X						
Identification of case studies									X	X	X							
Exchange of stakeholders												X						
<b>Phase 5 – Finalisation of the report</b>																		
Report and compendium of practices will be												X	X	X				

MONTHS	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18
sent to WEC- Europe/UNI Europa members to get final feedback																		
Finalisation of the report, taking stock of the EU stakeholders meeting												X	X	X				
4 <sup>th</sup> meeting of the Steering Committee to approve the report and the case studies													X					
Translation of executive summary + case studies														X				
<b>Phase 5 – Pan-European Conference</b>																		
Draft of the programme													X	X				
Launch of invitations														X	X			
Logistics														X	X			
Conference															X			
<b>Phase 6 – dissemination of report</b>																		
Follow up meeting																X	X	
Dissemination of documents																X	X	
Publication online on World Employment Confederation- Europe and UNI Europa websites																X	X	
<b>Phase 7 – Final reporting and closing of action</b>																		
Final reporting																		X

## 8. Payments and standard contract

Payment to the contractor will be made in two invoices:

1. A first invoice will be issued when contract is signed (whose amount should not exceed 30% of the overall budget)
2. A second invoice of the remaining fees to be paid at completion of the project.

## 9. Price

The external expert will be paid in accordance with the contract signed with the European Commission. Therefore, terms of price are not negotiable and do not represent a criteria of award. The selected external expert will be paid according to a maximum amount of € 45,000 (forty-five thousand euros), VAT included.

## 10. Selection and award criteria

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

- Capacity to work in a team project
- Capacity to work in fluent English, French, German, Dutch, Italian and Spanish
- Ability to draft written report, the compendium of social innovation practices and the executive summary in correct English
- Proofs of previous projects carried out in the same/similar field
- Ability to meet deadlines
- Ability to meet budget constraints
- Availability to attend meetings of the Steering Committee, EU stakeholders and pan-European conference, as well as the EU Sectoral Social Dialogue Committee (if needed)
- Capacity to prepare and to give PowerPoint presentations during the meetings and pan-European conference

The selected external expert will have to specify, in the written contract it will sign with the World Employment Confederation-Europe, that:

- It must undertake to accept checks and/or audits by the European Commission under the same conditions as those applied to the World Employment Confederation-Europe, and

- It will relinquish all claims & interests in respect to the Commission and in the name of the convention between the latter and the World Employment Confederation-Europe.

## 11. Content and presentation of the bids

The tender, written in English, will include the following elements:

- An official tendering letter
- A detailed résumé of the person(s) that will manage the project
- A detailed budget in euros meeting the requests of the European Commission
- A tendering document detailing how the objectives of the call for tenders will be met; the tendering document should include a detailed description of the methodology and actions to implement the research project.
- Information on references from the contractor on similar projects already handled.

## 12. Publication and conditions of the bids

This call for tender was published on 1<sup>st</sup> of February 2019, after having signed the grant agreement in January 2019. Replies to the tender must be sent back at the **within four weeks after the publication of the tender and thus by 1<sup>st</sup> of March 2019** to:

**Mr. Denis Pennel**  
**Managing Director**  
**World Employment Confederation-Europe**  
**Tour & Taxis building, The Royal Depot**  
**Avenue du Port 86c - Box 302**  
**B - 1000 Brussels**

The tenders will be sent in a sealed envelope. Tenders that will be received after the deadline will not be taken into consideration.

All envelopes received that have met the deadline will be opened in the presence of a representative of World Employment Confederation-Europe and of a representative of UNI Europa.

An evaluation Committee will be set up representing both World Employment Confederation-Europe and UNI Europa. This Committee will assess the content of the tenders received in due time. A statement of evaluation and classification of those requests for participation will be established, signed and dated by the evaluation committee. It will be preserved for purposes of later reference.

This statement will comprise of:

1. Name and address of contracting authority, the object and market value;
2. Name of excluded candidates and the motives for their rejection;
3. Name of the candidates retained for further scrutiny and justification of choice;
4. Name of the proposed candidate and justification of choice with regards to selection or award criteria.

The contracting authority will then decide. All candidates must send their offers by registered letter or by hand, addressed to the attention of Mr. Denis Pennel, Managing Director World Employment Confederation-Europe, Tour & Taxis Building, The Royal Depot, Avenue du Port 86c, Box 302, 1000, Brussels, Belgium.

For those requests by sent by registered letter, the date stamped will be considered as the day of dispatch. For requests submitted by private courier services and by hand which require a signed receipt, the World Employment Confederation-Europe administrative service will provide a signature and date stamped with the last open day of presentation, or if dated earlier, will be acknowledged by office receipt.