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## **ANNEX I**

### *Tender specifications for subcontracting external expertise*

***Tender specification - The study is part of a project supported by the European Commission (Budget line 04.03.03.01) "Strengthening social dialogue in the hospital sector in the new member states and candidate countries" – submitted jointly by the European Hospital and Healthcare Employers' Association (HOSPEEM) and the European Federation of Public Service Unions (EPSU)***

## **1. Background**

After several years of pre-social dialogue process led by the Joint Representative Taskforce<sup>1</sup>, the Committee on social dialogue in the hospital sector (henceforward: the Committee) will soon be established. The Committee aims to improve the quality of employment and quality of services in the hospital sector by means of constructive social dialogue.

Adequate representivity of EPSU and HOSPEEM is an important condition for success. However, social partners from new member states are not yet very well represented in the European social dialogue. Moreover, the situation and status of social dialogue within some of these member states leaves much to be desired. A strong national dialogue is a *conditio sine qua non* for adequate representivity in Europe. In turn, a high level of representativity will make the sectoral dialogue more effective at the EU-level. Hence, capacity building in the new member states is a major priority in the work programme of the Committee.

In order to reinforce the capacity building process and to stress the sense of ownership of the social dialogue results by their respective members, HOSPEEM and EPSU will build up the project in close partnership with those "new" and "old" member states social partners that more strongly expressed the need to build the initiative.

## **2. Purpose of Contract**

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<sup>1</sup> The Joint representative task force in the hospital sector was founded in 2002 by members of EPSU and CEEP involved in an informal social dialogue since 1999.

The purpose of the contract is to provide HOSPEEM and EPSU with a study on the social dialogue processes in the new Member states and acceding countries of the European Union and an analysis of the opportunities and obstacles for developing and strengthening these processes. The study will inform the debate at a conference for the social partners in the hospital sector in March 2008.

The consultant to be appointed will work with a steering group in order to provide the background research; he/she will participate and provide presentations to all steering group meetings and final conference. At the same time the consultant will report his work to the Administrator of the project who will maintain constant contacts between all partners and the expert.

As far as the pilot activities project is concerned, the consultant is expected to moderate the debates in each national seminar, facilitating the debate amongst national social partners and accompanying them in the setting up of action plans.

### **3.1 Tasks to be performed by the contractor**

The contractor will carry out the study for HOSPEEM and EPSU that should cover the following main points:

- Basic overview of the existing social dialogue processes in the 15 'old' Member states
- General analysis of the weaknesses and strengths of the different EU-15 Member States social dialogue structures, examined against the background of health and hospital sector reform
- Examination of the hospital sector structures in the new EU Member States and acceding countries, including issues of organisation and finance.
- Examination of the social dialogues processes, players and issues in the hospital sector in the new EU Member States and acceding countries
- Identification of opportunities for further development of the social dialogue in the new EU Member States and the acceding countries.

The information for this analysis will be collected through a survey, and/or a questionnaire and/or telephone or email contact with relevant people.

As far as the pilot activities project is concerned, the contractor should cover the following main points:

Moderation of debates during in each national seminar,

Facilitator of discussions amongst national social partners

Assistance of national social partners in the setting up of action plans

### **3.2 Guidance and indications on task execution and methodology**

The research could be carried out directly by the contractor or may be sub-contracted. The contractor would be expected to indicate whether he would be likely to sub-contract any of this work and how he would go about this.

The project steering group will be made up of 3 project coordinators, 1 representative from Trade Union of the Health Service and Social Care of the Czech Republic (OSZSP CR), 1 representative from Slovak Trade Union of Employees in Health and

Social Services (SOZPZASS) and one representative from Organisation of Social Partners in Hospitals in the Netherlands (StAZ).

The steering will group will oversee the project and assist the contractor. HOSPEEM and EPSU secretariats will function as liaisons between project steering group and contractor and will be guiding the contractor in the execution of the daily activities.

#### 4. Expertise required

The contractor would be expected to demonstrate:

- ❑ Experience in carrying out survey-based and interview-based research
- ❑ Experience of working with both trade union and employer organisations in several different European countries;
- ❑ Knowledge of the Hospital sector in Europe
- ❑ Knowledge and practical experience of Social Dialogue Structures in Europe
- ❑ Ability and experience to produce reports which are accessible in terms of both format and content
- ❑ Ability and experience to moderate debates
- ❑ Ability and experience to lead capacity building sessions taking into account different models of industrial relations
- ❑ Language skills: Fluent English (both written and spoken)

Expertise must be evidenced through the proposal for carrying out the work as well as CVs of proposed staff members.

#### 5. Time scheduling and reporting

Part of project	Timing	Days
Project steering group meeting to define content and methodology for study	December/January 2007	1
Preparatory meeting pilot activities	February 2007	1.5 days
15 country reports identifying social dialogue structures in the "old Member States"	January 2007 – March 2007	15 (1 day per country)
First seminar pilot activities	April 2007	1.5
Analysis of weaknesses and strengths of EU-15 social dialogue structures – chances and pitfalls for new member states	March 2007	11
Second seminar pilot activities	June 2007	1.5
Study visit	October 2007	2.5

10 country reports, examining the hospital sector and social dialogue processes in the new EU Member States and accession countries	April – July 2007	36 days (3 days per country)
Final seminar pilot activities	December 2007	2
Identification of opportunities for further action in new EU Member States and accession countries	September-December 2007	10
Compilation of final report	January 2008	4
Steering committee	January 2008	1
Conference to launch and discuss study	Prague, March 2008	2

## 6. Payment and standard contract

The payment will be made on receipt in different phases (initial payment of 30%, and 70% on completion of the final report)

The contract will be drawn up between HOSPEEM and the contractor.

## 7. Price

The maximum price is 35.600 EUR.

## 8. Selection criteria

The contractor would be expected to demonstrate:

- Experience in collecting data by use of surveys and interviews
- Experience of working with European trade union and employer organisations
- Knowledge of the Hospital sector in Europe
- Knowledge of Social Dialogue Structures in Europe
- Experience of writing reports for a European audience
- Ability and experience to moderate debates
- Ability and experience to lead capacity building sessions taking into account different models of industrial relations
- Language skills: Fluent English (both written and spoken)

He/she would also be expected to provide similar information on any organisations he/she would consider using as sub-contractors on the project.

## 9. Award criteria

The contractor will be awarded to the tendered whose offer represents the best value for money – taking into account the above criteria (Point 8)

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

## **10. Content and presentation of the bids**

### 10.1 Content of the bids

Tenders will set out their relevant experience and outline how they would obtain information for the study. They must include:

- All information and documents necessary to appraise the bid on the basis of the selection award criteria
- Detailed CV(s)

### 10.2 Presentation of the bids

Bids should be presented in triplicate and must contain all the information requested. Offers must be received within 16 days of the date of publication of this call for tender on the websites – **by 15 December 2006.**

The HOSPEEM/EPSU Project steering Group will be responsible for the final selection of the contractor, on the recommendation of the HOSPEEM/EPSU Secretariat.