



Regional Cooperation Council



This project is funded by the EU

Employment and Social Affairs Platform-ESAP Open Call for Consultancy Services

Reference Number: 072-022

Terms of Reference: 2022 Review of the performance of Western Balkan economies regarding the European Pillar of Social Rights
2022 update of the Western Balkans Social Score Board.

Contracting Authority: Regional Cooperation Council Secretariat

Reporting to: RCC Secretariat

Duration: approximately November 2022–February 2023

Application Deadline: 21 October, 2022

Reference Number: 072-022

Eligible: Respective consulting companies/consortia or individual consultants within bidding consortia

I BACKGROUND AND PURPOSE

The Employment and Social Affairs Platform 2 (ESAP 2) is a regional project financed by the European Commission and jointly implemented by the Regional Cooperation Council (RCC) and the International Labour Organisation (ILO) in the Western Balkan economies (Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia).

The objective of ESAP 2 is to assist Western Balkan (WB) economies with labour market and social policy reforms in order to improve the employment opportunities and working conditions of citizens in the region. More information about the ESAP 2 project can be found at Project's webpage: <https://www.esap.online/>

* This designation is without prejudice to positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence

Purpose

The purpose of this assignment is to produce 2022 reviews of the performance of the six Western Balkan economies in each of the 20 principles of the European Pillar of Social Rights (Pillar), the Regional Western Balkans Comparative Overview Report for 2022 and the 2022 Update of the Western Balkans Social Scoreboard (2021 and 2022 Q2 and Q3 data, as available). In addition, as part of the reviews, a fiche will be produced for each WB economy that will provide an overview of the state of play related to social economy and social entrepreneurship.

The 2022 WB-economy and regional reviews will include the latest data for the indicators of the Social Scoreboard and all policy developments, actions, legislation and implementation with regard to the realisation of the Pillar principles (including any proposed policies and actions in legislative and drafting stages). Furthermore, the reviews need to identify the main gaps in policy making, legislation and implementation with regard to the realisation of the Pillar principles in order to provide relevant policy and analytical input as to the prioritisation of topics in the economic governance process (employment and social) and the EU acquis alignment (Chapter 19).

Background

The [European Pillar of Social Rights](#) is the major initiative of the European Commission for building a fair and more social Europe.[†] The Pillar lays down 20 principles and rights considered essential for fair and well-functioning labour markets and welfare systems in 21st century Europe. The 20 principles are grouped in three areas: (1) *equal opportunities and access to the labour market* with principles and rights on education, training and life-long learning, gender equality, equal opportunities and active support to employment, (2) *fair working conditions* defined by secure and adaptable employment, wages, information about employment conditions and protection in case of dismissals, social dialogue and involvement of workers, work-life balance, healthy, safe and well-adapted work environment and data protection, and (3) *social protection and inclusion* covering childcare and support to children, social protection, unemployment benefits, minimum income, old age income and pensions, health care, inclusion of people with disabilities, long-term care, housing and assistance for the homeless, as well as access to essential services.

The [European Pillar of Social Rights Action Plan \(Action Plan\)](#) outlines concrete actions to implement the principles of the European Pillar of Social Rights as a joint effort by the Members States and the EU, with the active involvement of social partners and civil society. The Action Plan has employment, skills and social protection headline targets for the EU to be achieved by 2030.

[†] https://ec.europa.eu/commission/priorities/deeper-and-fairer-economic-and-monetary-union/european-pillar-social-rights_en

The key monitoring tool relevant for the European Pillar of Social Rights used in the European Semester is the [European Pillar of Social Rights - Social Scoreboard](#).

The European Pillar of Social Rights is of very concrete relevance for the Western Balkan economies in their reform efforts for advancing the delivery of social rights. The EU enlargement process covers employment and social inclusion areas which are part of the Pillar, namely through the economic governance and under Chapter 19 (Social Policy and Employment) of the EU accession negotiations. This includes a focus on employment and social reforms through monitoring of relevant policies, including in the Economic Reform Programme (ERP). In order to bring the ERPs closer in line with the European Semester, the monitoring of the social situation and policies includes the principles of the European Pillar of Social Rights. Therefore, for Western Balkans economies, it is key to understand their progress in alignment with the European Pillar of Social Rights in terms of the EU accession process, gaps and priority areas. It is important to highlight that in the enlargement process, the Social Scoreboard is used in the Economic Reform Programme (ERP) process to monitor progress on the implementation of the Pillar, subject to data availability.

In this context, the DG Employment, Social Affairs and Inclusion (DG EMPL) of the European Commission is assessing the economic governance policy areas of *employment and labour market, social inclusion, poverty reduction and equal opportunities, and education and skills*. Furthermore, DG EMPL is monitoring the alignment of WB economies to the EU *acquis* in Chapter 19 (Social Policy and Employment). The Pillar principles are directly related to the EU *acquis*.

In 2019, DG EMPL produced a first overview of the situation and trends regarding the performance of the Western Balkan economies in each of the 20 principles of the European Pillar of Social Rights. The review included available data for the indicators of the Social Scoreboard for WB economies and flagged areas where data were not available or were limited.

In 2020, RCC ESAP 2 project produced the 2020 Overviews on the Performance of the Western Balkan economies regarding the European Pillar of Social Rights. The following links include the 2020 reports for the Western Balkans economies ([Albania](#), [Bosnia and Herzegovina](#), [Kosovo*](#), [Montenegro](#), [North Macedonia](#), [Serbia](#)) and the [Overview Report for Western Balkans](#). The review included available data for the indicators of the Social Scoreboard for WB economies.

In 2021, RCC ESAP 2 project produced 2021 Overviews on the Performance of the Western Balkan economies regarding the European Pillar of Social Rights. The following links include the 2021 reports for the Western Balkans economies ([Albania](#), [Bosnia and Herzegovina](#), [Kosovo*](#), [Montenegro](#), [North Macedonia](#), [Serbia](#)) and the [Regional Overview Report for Western Balkans](#). The 2021 reviews have included available data for the indicators of the Social Scoreboard for the WB economies and identified areas where data were not yet available or limited. For the first time in the Western Balkans, ESAP 2 developed an interactive [Social Scoreboard for WB](#) modelled on EUROSTAT/ EC Social Scoreboard. The WB Social Scoreboard of the European Pillar of Social Rights is a data hub

of WB performance across headline and breakdown indicators for the European Pillar of Social Rights/social scoreboard domain.

II DESCRIPTION OF RESPONSIBILITIES

Objectives and Scope of the Assignment

The objective of this assignment is to produce:

- for each WB economy, the 2022 review report on the current situation and trends regarding their performance in each of the 20 principles of the European Pillar of Social Rights;
- for each WB economy, the fiche that will provide the overview of the state of play related to social economy and social entrepreneurship;
- 2022 Regional Western Balkans Comparative Overview Report for the EU Pillar of Social Rights;
- 2022 Update of the Western Balkans Social Scoreboard (2021 and Q2 and Q3 2022 data, as available).

The 2022 WB-economy and regional reviews will include the latest data for the indicators of the Social Scoreboard and all policy developments, actions, legislation and implementation with regard to the realisation of the Pillar principles (including policies at the legislative drafting stage(s)).

The structure of the six WB-economy reviews should be as follows:

I. Executive summary (1.5-2 pages) – update the overall performance of the reviewed economy, the performance in each of the three chapters of the Pillar and Action Plan and the areas with particularly strong challenges for the economy.

II. Introduction (1.5-2 pages) – provide an updated introduction to and contextualisation of the review for each economy.

III. The economy's performance in the 20 principles of the European Pillar of Social Rights (Pillar) and Action Plan (max. 35 pages) – provide an updated assessment of where each WB economy stands with regard to the realisation, in law and practice, of the rights and standards enshrined in EU Pillar of Social Rights principles. It must include the latest available data (2021 and Q2 2022), in particular focusing on the (headline) indicators included in the Social Scoreboard, also taking into account the 2022 EU revised Social Scoreboard.

It must also contain up-to-date information where there is any major policy initiative or change in the economy's agenda affecting the Principle, whether in legislative drafting or consultative stage.

IV. Conclusion (2-4 pages) – updated summary assessment of the main strengths and weaknesses/gaps of the economy's performance and a proposal for policy prioritisation in the short-to-medium term to advance alignment with the EU Pillar of Social Rights and Action Plan.

Annex I -Updated Social Scoreboard for each WB economy based on the updated EU Social Scoreboard, with most recent data (2022 and Q3 2022 as available); this is an excel file for each WB economy. In 2021, RCC ESAP 2 developed a web-platform- the WB Social Scoreboard modelled on the EUROSTAT (see link: https://www.esap.online/social_scoreboard/ and also download excel file, the excel file should serve as illustration on type of data collection which is required). Since the launch of the WB Social Scoreboard in 2021, there have been changes to the Social Scoreboard of the EU Pillar of Social Rights, the current version is at EUROSTAT SOCIAL SCOREBOARD. Thus, for the 2022 Update to the WB Social Scoreboard, data will need to collected and submitted in the excel file based following the format EU Social Scoreboard, 2022. Once the contract is signed, the selected Contractor will receive the latest version of the WB Social Scoreboard file from the RCC ESAP 2 project modelled on EU Social Score Board (not currently available at the link) and relevant guidance on this deliverable.

Annex 2 Fiche on Social Entrepreneurship (4-6 pages) – separate fiche that will provide the overview of the state of play (legislative, policies, strategy, other as relevant) related to social economy and social entrepreneurship for each WB economy.

The structure of the 2022 Regional Comparative Report for Western Balkans should be as outlined below and aligned with the 2020 and 2021 Regional Comparative Reports for Western Balkans. This Report is a regional comparative report and needs to draw on comparative analysis and trends from the six reports per WB economy, analyse each Pillar principle across the six WB economies and in comparison with EU 27, include summary assessment of the main strengths and weaknesses/gaps in terms of regional WB performance and trends in relation to the alignment with the EU Pillar of Social Rights and its Action Plan, and a draft proposal for regional priorities and actions in the short-to-medium term.

- I. Executive summary (1.5-2 pages)
- II. Introduction (1.5-2 pages)
- III. The WB performance in the 20 principles of the European Pillar of Social Rights (Pillar) and Action Plan (max. 25 pages)
- IV. Conclusion (3-4 pages)

Annex I -Updated Social Scoreboard for WB based on the updated EU Social Scoreboard, with most recent data for WB (2022 and Q3 2022 as available);

In 2021, RCC ESAP 2 developed a web-platform- the WB Social Scoreboard modelled on the EUROSTAT (see link: https://www.esap.online/social_scoreboard/ and also download excel file, the excel file should serve as illustration on type of data collection which is required). Since the launch of the WB Social Scoreboard in 2021, there have been changes to the Social Scoreboard of the EU Pillar of Social Rights, the current version is at EUROSTAT SOCIAL SCOREBOARD. Thus, for the 2022 Update to the WB Social Scoreboard, data will need to collected and submitted in the excel file based following the format EU Social Scoreboard, 2022. The Contractor will receive the latest version of the WB Social Scoreboard file from the RCC ESAP 2 project (not currently available at the link) and further guidance on this deliverable.

Annex II (5-6 pages) – separate fiche that will present key takeaways related to social economy and social entrepreneurship for the WB region, and recommended actions from a regional perspective.

Important Note: The cut-off date for reporting is Q3 2022 (end September 2022) for individual WB economy reports, fiches and the WB regional comparative report (data and policy developments), as well as updates to the WB Social Scoreboard.

Deliverables and timeline:

Deliverables	Draft Timeline, (to be agreed with RCC ESAP 2 project)
Methodology, approach & technical work plan with timelines and interim deliverables, addressing all RCC feedback	4 November, draft (9 th November, final, addressing all RCC feedback)
Six (6) <u>draft</u> 2022 WB 6 economy level reviews of the performance of Western Balkan economies regarding the European Pillar of Social Rights, with six (6) annexes on Social Scoreboard with 2021/Q2022 data for each of the six WB economies and six fiches with the overview of social entrepreneurship/economy in each WB economy.	2 December, 2022 (depending on feasibility).
<u>Draft</u> 2022 Overview Report for Western Balkans, with annex on Social Scoreboard with 2021/ Q 2022 data (excel file) average for WB economies and annex fiche on social entrepreneurship.	2 December, 2022 (depending on feasibility).
6 <u>Final</u> 2022 WB economy level reviews of the performance of Western Balkan economies regarding the European Pillar of Social Rights, with Annexes on Social Scoreboard with 2021/2022 data and six Fiches on social entrepreneurship, taking into account all comments after reviews.	30 th December 2022 or later (TBC), depending on timeline of feedback and extent of feedback.
<u>Final</u> Updated 2022 Overview Report for Western Balkans, with annex-fiche, taking into account all comments after reviews	30 December or later (TBC), depending on feedback timeline and extent of feedback
<u>Final</u> Social Scoreboard for WB economies based on the updated EU Social Scoreboard, with 2021 and Q2 and Q3 2022 data and other most recent data, this is an excel file with data collected for WB economies, WB averages, EU 27 and reference hyperlinks included on source of data (the excel file template will be provided by RCC ESAP 2).	30 December 2022 or later (TBC) depending on feedback timeline and extend of feedback
Power-point with findings and recommendations, both electronic copy and delivery at the Event (time TBC).	Timing to be confirmed with RCC ESAP 2 team

The indicative timeframe is stated above; the exact schedule will be agreed with the ESAP 2 project as part of the work plan and timeline approval; also the delivery of the final reports will depend on the timeline of the internal and external reviews of draft reports by partners and others, thus above timelines are illustrative only.

The period of implementation of the contract is stated as above to ensure that draft WB-economy reports, fiches and the regional WB comparative report are reviewed by stakeholders and all feedback is addressed by the Applicant. In addition, the Event where the presentation of the reports will take place will be on the date specified by the RCC. The experts need to be available at required times during the contract period to address the feedback on draft WB economies' reports, fiches and the WB comparative report.

Note: The illustrative Level of Effort (LoE, number of consulting days) is in the range of up to 12-15 consultancy days per each WB economy, plus the Level of Effort for the Team Leader for overall quality control of deliverables and preparation of the regional WB report (up to 15-16 days).

The above stated Level of Effort (number of consulting days) are **illustrative only** and the Applicant is expected to propose in its Offer, the Level of Effort (number of consulting days) per each WB economy, the Level of Effort (number of consulting days) for the Team Leader and the overall Level of Effort (total number of consulting days) in order for the ToR deliverables to be delivered at highest standard.

Methodology

The experts are expected to come up with the best approaches for undertaking this task, to be approved by the RCC ESAP 2 project as part of work plan. The following guiding principles should be taken into consideration:

- i. Desk review of primary and secondary information;
- ii. Interviews with relevant officials;
- iii. Any other methods applicable.

Lines of Communication

The Applicant will submit all deliverables to the RCC ESAP 2 project for review and approval. The Applicant will work closely with the RCC ESAP 2 project team from whom the Applicant will seek guidance to efficiently conduct the work.

The draft deliverables will be shared with the WB stakeholders and final deliverables will be presented and discussed in an Event organised by the RCC ESAP 2.

III PROFILE AND COMPETENCIES

The Applicant needs to have a team in place consisting of the Team Leader with international or regional expertise and experts from each of WB economies: Albania, Bosnia and Herzegovina, Kosovo*, Montenegro, North Macedonia and Serbia with relevant expertise, per below.

The WB experts need to have excellent understanding of labour markets, employment and social policies in the respective Western Balkan economies and excellent knowledge of the European Pillar of Social Rights. In addition, WB experts should be well versed and experienced in labour market and social data collection and analysis and in drafting high quality reports.

Criteria related to the experts delivering the service:

Education:	<ul style="list-style-type: none"> ▪ Post-graduate degree in economics, statistics, social sciences or related field
Experience:	<p>Qualifications and skills required</p> <ul style="list-style-type: none"> ▪ 10 years of relevant experience in the fields of labour market, employment and social policies for WB experts; ▪ 15 years of relevant experience in the fields of labour market, employment and social policies for the Team Leader; ▪ Excellent knowledge of labour markets and labour policies in the Western Balkan economies; ▪ Excellent communication and report writing skills; ▪ Analytical skills and ability to conceptualise and write concisely and clearly; ▪ Able to interact with professionals and representatives from the national administrations in the WB region; • Knowledge of the EU Pillar of Social Rights, Social Scoreboard (required) and experience in reviewing policies relevant to the EU Pillar of Social Rights for WB economies (desired).
Language requirements:	<ul style="list-style-type: none"> ▪ Fluency in English, as the official language of the RCC and fluency in WB language (as relevant for each WB economy)

Core Values

- Demonstrates integrity and fairness by modelling RCC values and ethical standards;
- Displays cultural, gender, religion, race, nationality and age sensitivity and adaptability.

Core Competencies

- Demonstrates professional competence to meet responsibilities and post requirements and is conscientious and efficient in meeting commitments, observing deadlines and achieving results;
- Result-oriented: Plans and produces quality results to meet the set goals, generates innovative and practical solutions to challenging situations;

- Communication: Excellent communication skills, including the ability to convey complex concepts and recommendations clearly;
- Team work: Ability to interact, establish and maintain effective working relations in a culturally diverse team;
- Ability to establish and maintain productive partnerships with regional and national partners and stakeholders.

IV QUALITY CONTROL

The selected Contractor should ensure an internal quality control during the implementing and reporting phase of the assignment. The quality control should ensure that the draft reports comply with the above requirements and meet adequate quality standards before sending them to stakeholders for comments. The quality control should ensure consistency and coherence between findings, conclusions and recommendations. It should also ensure that findings reported are duly substantiated and that conclusions are supported by relevant judgment criteria.

The views expressed in the report will be those of the contractor and will not necessarily reflect those of the Regional Cooperation Council. Therefore, a standard disclaimer reflecting this will be included in the report. In this regard, the expert may or may not accept comments and/or proposals for changes received during the above consultation process. However, when comments/proposals for changes are not agreed by the expert, he/she should clearly explain the reasons for his/her final decision in a comments table.

Quality Control by the Regional Cooperation Council

The selected Contractor's outputs shall undergo external reviews by relevant stakeholders, including the representatives of the ESAP 2 project team and the Regional Cooperation Council.

V. APPLICATION RULES

The application needs to contain the following:

- Technical Offer;
- Financial Offer.

Technical Offer

For companies and consortia of individual consultants:

- Company profile including a brief description (up to 2 pages) of the company. In case of a bidding consortium, the team leader should submit the profile of the consortium;
- Copy of Company's Registration Certificate (in case of consulting companies);
- In case of bidding consortia of individual consultants participating in this Call, they must indicate the members and show how the work is divided between them. Specifically, all members must name the team leader and authorise this member to

represent the consortium and receive payments on behalf of the other members. A corresponding written authorisation, power of attorney must be attached to the bid;

- Financial records - company's balance sheet and profit-and-loss statement for the past 2 years (only in case of a bidding of consulting companies);
- CV of experts, outlining relevant knowledge and experience as described in the Terms of References, along with contact details of referees;
- Concept note describing the main issues, information, data sources, research and analytical tools to be employed, as well as the timeline ;
- List of references for relevant activities implemented over the past years demonstrating relevant experience in the subject matter;
- Application Submission Form (Annex I);
- Signed Statements of Availability (Annex II).

Financial Offer (Free format)

The financial offer should reflect the following:

- All figures should be expressed in EUR;
- VAT amount, if applicable, should be presented.

When preparing the financial offer, the applicant should take into account the following:

- Use a free format for the Budget providing the lump sum for the services to be provided.

NOTE: The expert fees should be consistent with those applicable in the region.

Submission of applications:

Applications need to be submitted by October 21th, by 17:00 Central European Time to the following address ProcurementforRcc@rcc.int

- Please make sure that the application is submitted in two separate folders one containing Technical Offer and the other Financial Offer. The documents should be submitted in a form of copies of the originals.

VI. EVALUATION RULES:

- The consultancy will be awarded to the highest qualified bidder based on the relevance of skills and expertise to this assignment;
- The applications are evaluated following these criteria:

EVALUATION GRID	Maximum score
A. Technical Offer (A.1+A.2+A.3)	100
A.1. Work experience, references list: Relevant work experience; evidence of other contracts of the size comparable to that of the tender; experience with clients comparable to the Contracting Authority.	35
A.2. Quality and professional capacity of the consultant(s): CV(s) satisfy the criteria set forth in the Terms of Reference, education and experience demonstrate professional capacity and experience required.	35
A.3 Quality of the concept note: Concept note describing the main issues, information, data sources, research and analytical tools to be employed by the author, as well as the timeline.	30
B. Financial Offer/ lowest price has maximum score	100

Score for offer X =

A: [Total quality score (out of 100) of offer X / 100] * 80

B: [Lowest price / price of offer X] * 20

In addition to the results of the technical and financial evaluation, a competency-based interview will be held with the selected bidder.

Information on selection of the most favourable bidder

The RCC Secretariat shall inform candidates and bidders of decisions reached concerning the award of the contract as soon as possible, including the grounds for any decision not to award a contract for which there has been competitive tendering or to recommence the procedure.

Standard letter of thanks for participation to unsuccessful bidders shall be sent within 15 days after the contract is signed with the awarded bidder.

The candidates and bidders wishing to receive a feedback may send a request within 15 days after receipt of the standard letter of thanks.

The request may be sent to the e-mail address ProcurementforRcc@rcc.int or to the address of the RCC Secretariat:

Regional Cooperation Council Secretariat
Attention to: Administration Department
Building of the Friendship between Greece and Bosnia and Herzegovina
Trg Bosne i Hercegovine 1/V
71000 Sarajevo
Bosnia and Herzegovina

Appeals procedure

Bidders believing that they have been harmed by an error or irregularity during the award process may petition the RCC Secretariat directly. The RCC Secretariat must reply within 15 days of receipt of the complaint.

The appeal request may be sent to the e-mail address ProcurementforRcc@rcc.int or to the address of the RCC Secretariat:

Regional Cooperation Council Secretariat
Attention to: Administration Department
Building of the Friendship between Greece and Bosnia and Herzegovina
Trg Bosne i Hercegovine 1/V
71000 Sarajevo
Bosnia and Herzegovina

ANNEX I:**APPLICATION SUBMISSION FORM****REF: 072-022 Open Call for Consultancy Services**

Subject: An updated review of the performance of Western Balkan economies regarding the European Pillar of Social Rights

One signed copy of this Application Submission Form must be supplied.

1 SUBMITTED by:

	Name(s) and address(es) of the bidder submitting this tender
Full Company Name or Name of the legal entity/consortia of individual consultants	

2 CONTACT PERSON (for this Call)

Name	
Surname	
Address	
Telephone	
Fax	
e-mail	

3 DECLARATION

[Company Name or Name of the Consortia of Individual Consultants] _____ hereby declares that we have examined and accepted without reserve or restriction the entire contents of the Open Call for Consultancy: 072-022.

And we are not in one of the following situations:

- (a) Bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- (b) Have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;

- (c) Have been guilty of grave professional misconduct proven by any means which the Contracting Authority can justify;
- (d) Have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the Contracting Authority or those of the country where the contract is to be performed;
- (e) Have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity.
- (f) Are civil servants or other agents of the public administration of the RCC Participants, regardless of the administrative situation, excluding us from being recruited as experts in contracts financed by the RCC Secretariat.

We offer to provide the services requested in the open call for consultancy on the basis of supplied documentation subject of this call, which comprise our technical offer and our financial offer.

Name and Surname	
Signature	
Date	

ANNEX II: STATEMENT OF AVAILABILITY

REF: 072-022

By representing the Entity _____ we agree to participate in the above-mentioned tender procedure. We further declare that we are able and willing to work for the period(s) foreseen for the position for which our CVs have been included in the event that this tender is successful, namely:

Full Name	Available from (Date)	Available until (Date)	Acceptance by signature	Number of man-days associated to the ToR