

CALL FOR TENDERS

SELECTION OF A CONSULTANCY FOR PREPARING:

- **CARITAS CARES! COUNTRY REPORTS ON SOCIAL AND EMPLOYMENT DEVELOPMENTS – with a focus on access to services**
- **CARITAS CARES! EUROPEAN REPORT ON POVERTY AND INEQUALITIES IN EUROPE – with a focus on access to services**

Background information on Caritas Europa

Caritas Europa is a network of 49 organisations in 46 European countries. It is one of the seven regions of Caritas Internationalis. Our vision is of a civilisation of love and justice where every human person can flourish and live in peace and dignity as part of one human family. Caritas Europa has a heartfelt commitment to analyse and fight poverty and social exclusion; and to promote true integral human development, social justice and sustainable social systems in Europe and throughout the world. Caritas Europa advocates for, and with, people in need in order to transform society into a more just and inclusive civilisation. Caritas Europa recognises the need for mutual learning and innovation in all we do. Caritas Europa is active in the fields of advocacy, humanitarian aid and institutional development. More information on us can be found here: www.caritas.eu.

Caritas Europa is issuing this Call for Tenders with a view to selecting a consultant who shall perform the duties described in the Terms of Reference below.

Should any problems of interpretation arise in the course of drawing up the Tender documents, interested parties may submit via e-mail (see the address under point 7 of the Terms of Reference) a request for further information, no later than ten (10) calendar days before the deadline for the receipt of Tenders.

There is no commitment on the part of Caritas Europa to accept any Tender or part thereof that is received in response to the Call for Tenders. Caritas Europa reserves the right to accept Tenders with non-substantial defects and to reject Tenders received after the deadline for receipt of Tenders, without indemnity or justification.

Caritas Europa reserves the right to modify or cancel all or part of the Call for Tenders, should the need arise, without having to justify its actions and without such action conferring any right to compensation on applicants. Caritas Europa reserves the right to extend the deadline for receipt of the Tenders. In that case, all the applicants and applications will be subject to this new deadline. Tenders are not paid. No reimbursement of expenses related to the preparation of any Tender will be made by Caritas Europa. The Call for Tenders and any further information communicated to the applicant or which come to his knowledge in the course of the Call for Tenders and the performance of the work are confidential and are strictly dedicated to the purpose of the Call for Tenders.

The deadline for the receipt of tenders is 06th of December 2018, 23:59 CET

TERMS OF REFERENCE

- **CARITAS COUNTRY REPORTS ON SOCIAL AND EMPLOYMENT DEVELOPMENTS – with a focus on access to services¹**
- **CARITAS REPORT ON POVERTY AND INEQUALITIES IN EUROPE – with a focus on access to services**

1. Introduction

Caritas is present and active in every country in Europe, with well-developed national, sub-national and locally based structures assisting the poor at grass roots level. As major non-statutory providers of social services, Caritas member organisations are extremely concerned about the way in which economic and social developments are impacting on the poorest and most vulnerable members of society. Caritas Europa has been actively involved in promoting and monitoring the implementation of the European Social Charter (ESC) of the Council of Europe as well as the EU's European Pillar of Social Rights also in the framework of the operating grants, financed by the European Commission under the EaSI programme of the EU.

A main goal of our engagement is to monitor if and how poverty reduction and employment growth targets are addressed in Europe and in national policies, in particular in terms of access to services. Caritas' efforts in monitoring the social reality in different European countries and in analysing the outcomes of the policies are presented, e.g. in its biennial Caritas Cares! Series of national and European reports, its past Shadow Reports on Europe 2020 Strategy and in respective country summaries (see https://www.caritas.eu/publications_and_resources/?fwp_resource_type=publication and financed by the CARES - Caritas Actions Reinforce the European Social dimension programme.

Our contributions are based on Caritas organisations' expertise in tackling the needs of the most excluded groups and our capacity to provide solid evidence on selected social problems, i.e. through the provision of services and the development of Caritas Poverty Observatories.

In 2019, Caritas Europa wishes to produce country reports and a European report on poverty and inequalities in Europe. The specific focus of this edition of the Caritas Cares! Series will be on (lack of) access to services as part of national social models. With selected Sustainable Development Goals and Targets and the Europe 2020 targets on poverty and employment as reference frameworks and based on Caritas Europa's vision for sustainable social models, the reports focus particularly on the challenges that should be urgently tackled in order to improve access to services, making use of existing EU and Council of Europe processes, programmes and legal instruments (such as the European Semester Process, the EU Pillar of Social Rights and the European Social Charter).

2. Expected deliverables and services of the consultant

The overall objective of the consultancy is to produce the:

- a. Caritas Cares! Country Reports on availability, accessibility, affordability and adequacy (quality) of services in each country under review, to be further referred to as the 'Reports'.
- b. "Caritas Cares!" European comparative report on trends in Europe with regards to the provision of services.

¹ The reports will focus on the following services: early childhood and care, homecare services, housing, healthcare, employment services and other social services.

a. Concept of the Caritas Cares! Country Reports and their objectives

The Caritas Cares! Country Reports should provide an analysis of the availability, accessibility, affordability and adequacy (quality) of services in terms of addressing poverty and social exclusion in European countries based on the framework described above, and attempt to identify concrete causes of non-access to services for the most deprived. They will be produced mainly on the basis of the data, testimonies, observations and other evidence, and recommendations provided by Caritas organisations through questionnaires. These Caritas Cares! Country Reports should serve as advocacy tools for promoting Caritas' positions and recommendations aiming at reducing poverty and social exclusion by improving the performance of services, at the national, EU and Council of Europe levels. The Caritas Cares! Country Reports will underpin the Caritas Cares! European report and will in particular feed the policy debate and Caritas Europa advocacy on the implementation of the European Pillar of Social Rights and the post 2020 Social Policy strategy for the EU.

b. Concept of the Caritas Cares! European Report and its objectives

The Caritas Cares! European report should provide an analysis of the (lack of) access to services in Europe with a focus on its impact on poverty, inequality and exclusion in European societies. The findings of this Report should be based and/or linked inter alia with evidence collected by Caritas organisations. Moreover, European and relevant national statistics and experts' reports, as well as grey literature and other scientific evidence can be used to support the European Report's observations. Caritas Europa believes that the European Semester has the potential to steer implementation of the European Pillar of Social Rights. Therefore, the Caritas Cares! European report should also present concrete recommendations for policies and actions that should be applied in order to let the Europe 2020 Strategy contribute to the reduction of poverty and social exclusion. It should also represent recommendations for the design of a Social Europe 2030 strategy to implement the Sustainable Development Goals, with a focus on the role of services in such strategy. The Caritas recommendations should concern the European Semester process and in particular the Country Specific Recommendations and the National Reform Programmes. Caritas Europa also believes that the European Social Charter is an excellent instrument to ensure access to services and thus advocate for the reduction of poverty and social exclusion in the Council of Europe Member States.

These recommendations of the Caritas Cares! European report should also show how various important EU Initiatives and instruments, incl. the Recommendation on Investing in Children, the European Social Fund Plus etc. should be streamlined into the European Semester process in order to strengthen their role and ensure complementarities with messages and guidelines produced. This should come into the Caritas Cares! European report.

c. Style of the reports

Caritas advocacy is rooted in **Catholic Social Teaching**, puts relevant challenges for society on the **European political agenda**, aims to **change policies** and bring **hope** to politicians, includes the **voice of the people affected by poverty**, is based on well prepared **policy analyses** (evidence based, with input by Member Organisations and, where possible, of the people affected), includes concrete **policy proposals**, where possible based on good practice examples from Caritas projects, is **outcome oriented**: follows the whole political process and combines efforts at national and European levels. This "Caritas style" shall be reflected in the reports.

d. Methodology

Both Caritas Cares! Country Reports and the Caritas Cares! European report will be prepared mainly on the basis of questionnaires drafted by the consultant and completed by Caritas Europa Member Organisations operating in the countries covered by CARES grant. The Caritas Cares! European report will also rely on grey literature and other scientific data. The Caritas Cares! Country Reports will underpin the Caritas Cares! European report findings and recommendations with more specific country analyses. They will serve the Member Organisations as a tool supporting their advocacy actions at the national and Council of Europe levels. The consultant will also conduct interviews with Caritas Europa Member Organisations to complement the information received through the questionnaire.

The consultant will be involved in agreeing on the contents of the questionnaire's template in order to ensure that all information necessary for producing the specified and available from the Member Organisations can be collected via the questionnaire. The consultant will also be obliged to liaise directly with respective Member Organisations, especially in case any further clarifications regarding the information provided through the questionnaires is needed or any information may be missing. The consultant will also need to remind the Member Organisations about concrete deadlines for their inputs and reactions and check the consistency of the Caritas Cares! European report with the observations of the respective Caritas Cares! Country Reports. The contact details of relevant Member Organisations' staff engaged in the project will be provided to the consultant. The scope and timetable of Member Organisations' engagement will be explained by Caritas Europa Secretariat.

The consultant will also play an active role in a seminar to be organised by the Caritas Europa Secretariat, foreseen to take place in March 2019 in Brussels, with the Member Organisations involved or interested in the process (18-19.03.19 tbc). This seminar will be aimed at consulting Caritas Member Organisations about the process to develop the reports and creating ownership and a common understanding of the theme. Part of the seminar's agenda will be dedicated to discussing the Caritas Cares! European report and Caritas Cares! Country Reports concept and structures foreseen as well as the contents of the questionnaires that will be produced in order to receive information needed. The consultant is expected to actively participate in this session through presenting the concept of the Caritas Cares! European report and Caritas Cares! Country Reports as well as discussing the questionnaire and next steps in the process. The details of the consultant's inputs will be agreed between her/him and Caritas Europa Secretariat prior to the seminar. Max. 1 day presence in the seminar is expected from the consultant.

e. Content of the Caritas Cares! Reports

Caritas Cares! Country Reports on access to services

- i. Description of recent trends in the area of availability, accessibility, affordability and adequacy of services with particular use of Caritas (Poverty Observatories) and national/regional data.
- ii. Description and assessment of progress made toward achieving Europe 2020 national targets (social) and state of play re ratification and implementation of the European Social Charter (relevant provisions), including discrepancies in implementation of relevant legislation and impact on achieving the Sustainable Development Goals.
- iii. Assessment of the adequacy of relevant Country-specific recommendations adopted in 2017/2018 by the Council.
- iv. Description of innovative services or other forms of support developed and applied by the Caritas organisation(s) that can be up-scaled and mainstreamed into policies.
- v. Recommendations to the national authorities (and if possible to EU and CoE institutions and that will be used as proposal of CE Country specific recommendations for 2019/2020) for the national policies that include changes in legislation, concrete reforms of the policies, changes in the programmes related to access to services.

- vi. Description of the impact of policies/legislation/programmes adopted and implemented since September 2016 on the employment and social situation.
- vii. Feedback on the EU initiatives and programmes' implementation incl. Programmes financed by the European Social Fund and recommendations for improvements.
- viii. Good practices of Caritas organisations.
- ix. Testimonies of people experiencing poverty.

Electronic version length: expected to be no more than 20 pages each (depending on the data and information available from the questionnaires).

Caritas organisations from EU Member States as well as from some non-EU Member States shall participate in this reporting. It is assumed that 18-23 Country Reports will be produced. These reports are expected to be PDF documents, uploadable on the Caritas Europa website.

“Caritas Cares!” European report on access to services

- i. Introduction on progress towards eradication of extreme poverty and reducing inequalities in Europe by improving availability, accessibility, affordability and adequacy of services.
- ii. Summary of the report
- iii. Part I: changes in access to services between 2008 and 2018, based on desk research, as well as Caritas organisations' assessment of the situation of people experiencing poverty and their access to services, including Caritas organisations' data, testimonies and other evidence presented in the Caritas Cares! Country Reports and/or questionnaires mentioned in point 2 above, and backed up by Eurostat and other available data. Comparing the various welfare state models, the chapter will identify trends regarding accessibility, affordability, availability and adequacy of services, also based on Caritas organisations' assessments and evaluation of ESC and relevant EU Initiatives and programmes' implementation, in particular the selected chapters of the European Pillar of Social Rights.
- iv. Part II: the experience of Caritas' service users, as well as Caritas practices and project examples.
- v. Recommendations for relevant EU processes (European Semester process, EU Pillar of Social Rights, Europe 2030, SDGs), Programmes and Initiatives and Council of Europe European Social Charter.

The contents of the Caritas Cares! European report and its findings should be coherent with the Caritas Cares! Country Reports and be based as much as possible on the information available in the questionnaires completed by Caritas Member Organisations. The report will also include several testimonies of people experiencing poverty.

The printed version is to be created for purposes of advocacy and should be around 45 printed pages in length, meaning about 25 Word pages, give or take.

An electronic version can be longer and include more detail/statistics.

3. Final version of the Caritas Cares! Country and European Reports

The findings of the Caritas Cares! Reports will be discussed by the consultant with Caritas Europa and the contributing Member Organisations; the final Caritas Cares! Reports' contents incl. recommendations and findings can be changed by Caritas Europa. The final version of the Caritas Cares! Reports will require final approval by Caritas Europa.

The Caritas Cares! Reports and their content, including the drafts and intermediate outputs, are intellectual property of Caritas Europa. Caritas Europa commits to mention explicitly the authorship of the consultant in the final publication. The consultant has to receive previous explicit authorisation of Caritas Europa to use the content of the Reports for other purposes. Caritas Europa should be given the credit in media interviews and follow up publicity for the reports and related expertise gleaned as a result.

A launch of the European report is foreseen to take place early 2020. Ideally, the consultant would free his/her schedule to be able to present the findings of the publication.

4. Timing of the project

Deadline for submitting offers is 06.12.18. The tender will be awarded by 15.01.19.

Deliverables:

- Creation of questionnaire for authors and presentation at CARES Seminar on 18-19.03.19.
- Caritas Cares! Series Country Reports: first draft reports by 04.06.19; the 2nd draft reports are to be delivered by 03.07.19.
- Caritas Cares! Series European Report: a first draft report is due on 24.06.19; the second draft by 23.08.19; and the final draft report is to be delivered by 06.09.19.

5. Required profile

The consultant will:

- Have evidence-based, in-depth knowledge of the EU social policy environment, including the Europe 2020 Strategy, and a clear understanding of the related processes, namely the European Semester process.
- Have evidence based in-depth knowledge on the EU Initiatives and Programmes incl. European Pillar of Social Rights, European Social Fund, relevant Sustainable Development Goals, etc. as well as understand their implementation arrangements and progress.
- Have knowledge of the European Social Charter and the “Turin Process”.
- Have knowledge of the various national social models in Europe and the role of service providers in that context.
- Have demonstrated that s/he has previously conducted research in the area of EU social policy and is able to formulate concrete policy recommendations.
- Have demonstrated capacity of elaborating quantitative and qualitative data.
- Have previously been involved in similar processes and can demonstrate cooperation with national governments and major NGOs in this policy area.
- Have knowledge of and - preferably – experience with the Caritas Ethos, ideally through having worked with Caritas organisations.
- Have excellent reporting skills in English.

6. Maximum Budget and information on EU funding

This project will be implemented pending final approval of financial support from the European Union Programme for Employment and Social Innovation "EaSI" (2014-2020). The maximum budget foreseen for the offer should not be more than €20.000 (incl. all costs related to delivering the services specified in the ToR and VAT) – and pending final approval of the EC funding. This amount includes already all possible expenses necessary for the complete execution of an eventual contract (insurance, telephone costs, transport, proofreading, guarantees...).

Payments for consultant's services will be transferred as follows:

- 15% of the budget will be paid for drafting the questionnaire and contributing to the seminar, whether or not Caritas Europa will have received final approval of the EC funding grant by then.
- Upon final approval of the EC funding grant, 30% of the contract value will be transferred to the consultant's account following approval of the Caritas Cares! Country Reports by Caritas Europa.
- Upon final approval of the EC funding grant, 55% of the contract value will be transferred to the consultant's account following approval of the Caritas Cares! European Report by Caritas Europa.

7. Tenders

The tender should include at least:

- A brief technical note reflecting your understanding of the tasks expected from the consultant and the methodology foreseen.
- A draft work plan reflecting the above elements.
- A justification showing how the profile of your company and proposed staff matches the requirements listed in point 5 incl. the CVs of proposed experts and evidence of company experiences.
- Your financial offer (including VAT) based on the number of person/days you intend to spend on this assignment as well as any travelling costs foreseen.

The tenders shall be entirely drafted in English.

The tenders **shall be submitted at latest by the 06.12.18 at 23:59 CET** by e-mail to Secretary General Secretary-General@caritas.eu, with Peter Verhaeghe, pverhaeghe@caritas.eu and Shannon Pfohman, SPfohman@caritas.eu in cc. Please write in the subject line: "Caritas Cares Series Tender Application".

8. Selection Process

Caritas Europa will ponder the quality of the different elements of the received tenders, including the proposed fee, and decide on the most suitable candidate. If needed for the selection process additional information can be requested to the shortlisted candidates. Only shortlisted applicants will be informed of the decision taken on their Tender applications.



This activity has received financial support from the European Union Programme for Employment and Social Innovation EaSI (2014-2020). For further information please consult: <http://ec.europa.eu/social/easi>