

Tendering information

Framework contract on research, training and capacity building activities

1. Background

Created in 2001, FEBEA (the European Federation of Ethical and Alternative Banks and Financiers, febea.org) is a not-for-profit association based in Brussels and governed by Belgian law. Open to member countries of the European Union as well as other non-EU countries in Europe, it gathers financial institutions whose aim is to finance the social and solidarity-based economy. FEBEA was created by 6 financial institutions and nowadays federates 33 members (banks and other types of financial institutions, associations and organisations dedicated to promotion and development of social finance) based across 16 European countries (14 countries of the European Union, Norway and Switzerland), serving more than 700,000 people, customers and shareholders, with aggregated balance sheet assets of over 30 billion €. FEBEA members are part of (and in many cases were funded by) citizens-led transformative movements and can mobilise different resources and different tools to achieve their societal and environmental goals.

We use the terms "social finance" and "social enterprise finance" interchangeably to define the variety of actors - including FEBEA members, engaged in the financing of social economy organisations, social enterprises and microenterprises. Social finance encompasses the complete toolbox of instruments to support social objectives and includes social lending, commercial capital, pay-for-success mechanisms or philanthropic capital. Social finance is also understood to be a part of the wider sustainable finance ecosystem, which includes intermediaries dedicated to the financing of environmental projects but without a specific focus on the social economy.

Ethical finance is a term to describe a specific approach to finance that supports the real and social economy and puts an emphasis on fairness, inclusiveness and transparency. The FEBEA Charter defines the core principles of Ethical Finance with regard to: the role of financial institutions to promote social inclusion, sustainable development, social economy and social entrepreneurship; the collection of savings from citizens and real economy activities; the destination of funds to socio-economic activities aimed at social, environmental and cultural profit; management criteria based on transparency and participation; an approach deeply rooted in the territory in which it operates, and in its socio-economic networks. The specificity of ethical financiers compared to others is that they actually dedicate 100% of their resources to achieving social goals and do so through a transparent and participatory governance. In addition, ethical financiers always define their strategy while considering both the environmental and social impact of their investments upfront and track the impact post-investment.

2. Name of the contract

Framework contract on research, training and capacity building activities (hereinafter the "Contract").

3. Participation

Participation in this procurement procedure is open on equal terms to all natural and legal persons regularly registered coming within the scope of the assignment.

Participants must be established in a member state of the EU or the European Economic Area.

4. Subject of the contract.

This negotiated procedure concerns the provision of expert support to accompany the set up and implementation of the research, training and capacity building activities carried out by FEBEA from the start date of the project until the end (the indicative duration of the Contract is between January/February 2023 and December 2023). In addition, expert support is needed to assess the results of the projects and facilitate the transfer of knowledge and relevant experience to a wider community of professionals and stakeholders.

4.1 Objective 1

To reinforce the capacity of FEBEA and its members through the offering of training and capacity-building activities, as well as a platform for the exchange of good practices and raising their awareness about relevant EU policies and opportunities in the social economy and social finance sector.

The introduction of capacity building activities addressed to strengthen the capacities and skills of FEBEA members will have a direct impact on the improvement of the functioning of the network, increasing also the collaboration with members and partners, improving the impact of FEBEA at internal and external levels, identifying and using new tools and resources to improve the daily management activity of the organisations and guaranteeing better collaboration and communication with members.

4.2 Objective 2

To provide data and research on developments in the field of social enterprise finance, which can serve as input for evidence-based policy making at EU, national and local levels.

Synergies will be actively sought between the research and training activities, with topics and outcomes exchanged in order to ensure their relevance and optimise skills and resources.

5. Tasks to be carried out by the Contractor

Task 1 - Preparatory activities.

Training and capacity building activities are designed taking into consideration FEBEA's knowledge and experience and its members' needs. For example, for the general public the topics would be more generic and entry-level, whereas for FEBEA's members the topics would be more technical and involve impact measurement, financial instruments, fintech and other innovations in the field so as to broaden the scope of their respective impact. Additionally, the exchange of good practices among members or inviting external expertise would also be envisaged.

The training offer will be modular, so that interested attendees can pick and choose what interests them and participate in the programme throughout the year. The training programme will combine online and offline format. This includes the mobilisation of resources. Resources do not entail only funding, but also which external/internal expertise is needed, if specific speakers/trainers are needed, as well as an online platform where learners can exchange and find the materials, books/articles/regulation, and so on.

Deliverable: programme of training and capacity activities to be validated by FEBEA.

Task 2 - Organisation of the training and capacity building programme.

Once the content of the programme and the agenda of the training workshops/webinars are finalised, FEBEA will launch the training via social networks, newsletter and emails. Potential topics identified for the first training sessions are (preliminary assessment): new developments in social finance (blockchain, AI, etc.); Social Housing; Impact management – latest developments and trends; Equity capital in the social economy (catalytic capital, participatory capital, funding workers buyouts...).

Given the impact of the pandemic and related uncertainties, as well as the outcome of the needs analysis, the approach developed may be a mix of in-person and online training, workshops and webinars. It is expected to organise 4 training workshops/webinars. Additionally, a 1-day training will be held in the context of the annual FEBEA Conference and General Assembly. If possible it will be in-person, otherwise it will be delivered online.

Deliverable: delivery of four (4) training and capacity building workshops/webinars, including educational materials, recordings, attendance list, and any other related documentation. 1-day training in the context of the annual FEBEA Conference and General Assembly.

Task 3 - One-to-one Technical Assistance to FEBEA members.

This service will be created in order to provide ad-hoc capacity-building to FEBEA members that request it on specific topics. A 1-day visit (either online or in presence) to the requesting member will be organised, structured as an afternoon and a morning session.

This will combine informal as well as formal aspects, introduce site visits as well as plenary sessions/ workshop sessions. It is expected to deliver 5 one-to-one TA sessions per year for up to 5 members while considering the tight time constraints.

Deliverable: programme of the five (5) TAs, attendance list, recordings and any other related documentation.

Task 4 - Monitor and improve.

A monitoring system is useful to continuously assess the quality of the training and TA and improve upon it. To this end, an evaluation system will be designed and performed. This can also be useful not only to improve the existing training offer but to expand it.

Deliverable: monitoring and feedback forms, including a final progress report on the monitoring and how to improve the service.

Task 5 - Research

This task relates to the development of analytical activities, such as the collection of data and statistics, the provision of feedback, the development of common methodologies and publications. Research will be linked to the training activities when feasible and focus on topics relevant to the social economy and ethical finance. Additional topics will be identified via surveys with FEBEA members and related stakeholders.

This includes consultations with other organisations; development of partnerships with universities and research institutions, participation in research events/presentations; contribution to research publication.

Deliverable: at least four research publications drafted, including a planning document outlining topics, data sources and methodologies.

6. Economic offer

The maximum amount available for this contract is EUR 50,000.00 (fifty thousand/00 euros), all taxes and charges included.

The payment shall be made in 2 instalments:

- **First interim payment.** The Contractor shall submit an invoice for an interim payment of up to maximum 50% of the total amount within 30 days after signature of the Contract.
- **Payment of the balance.** The Contractor shall submit an invoice for payment of the balance, which shall be accompanied by the Final progress report. It shall be paid within 30 days of the acceptance of the Final progress report by FEBEA.

7. Duration of assignment

From signature of the contract (January/February 2023) until December 2023. Renewal of the assignment can be done pending the continuation of the EU support in the following years.

8. Time schedule and deliverables

The indicative schedule of the main deliverables is as follows:

Actions/deliverables	Timetable (2023)
Entry into force	January/February
Kick-off meeting	Within one week from Contract signature
Programme of activities + presentation of a draft agenda for the 1st workshop	Within two weeks from Contract signature
First Technical Assistance event	February
First training and capacity building workshop/webinar	March
Second Technical Assistance event	April
Second training and capacity building workshop/webinar	May
Third Technical Assistance event	June
Third training and capacity building workshop/webinar	September
Fourth Technical Assistance event	October
Fourth training and capacity building workshop/webinar	November
Fifth Technical Assistance event	December
Final progress report	December

9. Deliverables

Below is the list of deliverables that the tenderer shall provide for the Contract:

1. programme of training and capacity building activities.
2. delivery of four (4) training and capacity building workshops/webinars, including educational materials, recordings, attendance list, and any other related

documentation. 1-day training in the context of the annual FEBEA Conference and General Assembly.

3. programme of the five (5) TAs, attendance list, recordings and any other related documentation.
4. monitoring and feedback forms, including a Monitoring report and how to improve the service.
5. at least four research publications drafted, including a document planning topics, data sources and methodologies.

10. Organisation

Monthly coordination meetings between the Contractor and FEBEA will be held. They will be complemented by phone calls if necessary for the good implementation of the contract.

11. Structure and content of the tender.

The tenders must be presented as follows:

- **Identification of the tenderer.** See the Legal Entity Forms and Financial Identification Form annexed.
- **Technical offer.** The technical offer is a document that must cover all aspects and tasks required in the technical specifications and provide all the information needed to apply the award criteria. Offers deviating from the requirements or not covering all requirements may be rejected on the basis of non-compliance with the tender specifications and shall not be evaluated. The maximum length of the document (annexes excluded) shall be 20 pages. In Annex the CVs of all the expert(s) - preferably in Europass format - that are members of the proposed team shall be provided.
- **Financial offer.** The price for the tender must be quoted in euro. Tenderers from countries outside the eurozone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to bear the risks or the benefits deriving from any variation. Prices must be quoted including all duties, taxes and other charges, including VAT. The quoted price must be a fixed amount which includes all charges (including travel and subsistence). Travel and subsistence expenses are not refundable separately.

12. Evaluation and award

The evaluation is based solely on the information provided in the submitted tender. It involves the following:

- Verification of non-exclusion of tenderers on the basis of the exclusion criteria
- Selection of tenderers on the basis of selection criteria
- Verification of compliance with the minimum requirements set out in these tender specifications

- Evaluation of tenders on the basis of the award criteria

FEBEA may reject abnormally low tenders, in particular if it is established that the tenderer does not comply with applicable obligations in the fields of environmental, social and labour law.

FEBEA will assess these criteria in no particular order. The successful tenderer must pass all criteria to be awarded the contract.

Tenderers must prove their legal, regulatory, economic, financial, technical and professional capacity to carry out the work subject to this procurement procedure. The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to FEBEA that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

FEBEA reserves the right to require evidence of the legal and regulatory, financial and economic and technical and professional capacity of the tenderers at any time during the procurement procedure and contract performance. In such cases, the tenderer must provide the requested evidence without delay. FEBEA may reject the tender if the requested evidence is not provided in due time.

13. Evaluation criteria

Tenderers must prove that they are allowed to pursue the professional activity necessary to carry out the work subject to this call for tenders.

The team proposed in the bid must have knowledge of and/or practical experience of at least 6 years per team member in the social economy and ethical finance in Europe. The CVs of the team will be used as a reference for evaluating the relevant experience.

In addition, to prepare and moderate interviews and workshops, the team must have experience in facilitating workshops and solid experience of analysis in the field of social finance / social enterprise development in Europe. Finally, drafting synthesis reports and revising the practical guide will require in-depth knowledge of EU policies and actions in the field of social finance, experience in drafting and revising documents in English.

The CVs of the experts must include a list of principal activities related to the relevant policy domain over the past 4 years (mentioning the name of the expert, the title/subject of the project, the language of the project /deliverables, web links).

The tenderer must have the necessary financial capacity to perform this contract until its end. The legal representative will need to fill and sign a Declaration of Honour to attest the tenderer's financial capacity.

14. Quality criteria

QC.1, max 30 points: *Relevance of the tender*

- Relevance of the tender and its expected results to the objectives of the call for tender and to the stakeholders.

QC.2, max 40 points: *Proposed methodology and tools*

- Clarity and feasibility of the proposed methods and tools for fulfilling the tasks (max 20 points)
- Appropriateness of application of methods for collecting, processing and interpreting the data and for the facilitation of mutual learning / exchange of experience and dissemination of good practices (max 20 points)

QC.3, max 30 points: *Approach proposed for the management of the work*

- General management approach, including organisation of work and work plan, in particular the careful planning with a view to quality delivery on time, deadlines and resources allocation as well as quality assurance.

Tenders which do not obtain at least 50% of the maximum score for each award criterion and at least 60% of the overall score for all criteria, will not be considered in the evaluation procedure.

The contract will be awarded to the most economically advantageous tender, i.e. the tender offering the best price-quality ratio. A weight of 70/30 is given to quality and price respectively.

15. Presentation of bids.

- Bids must be submitted by **email** in **PDF format** to the following email address: recruitment@febea.org
- They must include all the information required: Legal entity form, Financial identification form, Declaration of Honour, Technical offer (20 pages max), CVs of experts in annex.
- They must be clear and concise.
- They must be signed by the legal representative.
- They must be submitted in accordance with the specific requirements of the invitation to tender, within the deadlines laid down.

16. Application window

The period of time open to receive applications starts on the **26th of January 2023** and will close on the **10th of February 2023 at 17:00 CET**.

Bids received outside this time frame will not be taken into consideration.

**With the financial support of the EU*



Co-funded by
the European Union

febea
FÉDÉRATION EUROPÉENNE DES FINANCES
ET BANQUES ÉTHIQUES ET ALTERNATIVES