



**Joint Project of the European Social Partner Organisations:
Integrated Programme of the EU social dialogue (Phase 2)
Tender specifications**

Date of publication
on the BUSINESSEUROPE website:
18 / 07 / 2008

*Under reserve of signature of contract

I./ Background

A./ Project description

Introduction

In the framework of the EU Social Dialogue Work Programme 2006-2008 (at annex), the European Social Partners have undertaken to:

- Complete the national studies on economic and social change in the EU 10, enlarge them to cover the EU 15 and on that basis promote and assess the orientations for reference on managing change and its social consequences and the joint lessons learned on EWCs (action 5),
- Continue their work of capacity building for the social dialogue in the new Member States, extend it to candidate countries, and examine how the employers and trade union resource centres providing technical assistance to the 10 new Member States could provide help to social partners of all EU countries (action 6).

The current call for tender constitutes the subcontracting work needed to complete the second phase of the wider 36-month project which is currently being undertaken entitled "Integrated Programme of the EU social dialogue".

European social partners have therefore responded to a call for proposal to the European Commission (Budget Line 04/03/03/01) to obtain the necessary funding in order to be able to carry out these actions. In the framework of this call, they expressed their intention to select a subcontractor.

These tender specifications therefore detail the background, tasks, price, and selection criteria and procedures regarding the subcontractor.

ETUC – EUROPEAN TRADE UNION CONFEDERATION – Bd du Roi Albert II, 5 – 1210 Bruxelles

BUSINESSEUROPE – THE CONFEDERATIONS OF EUROPEAN BUSINESS – Av de Cortenbergh, 168 – 1040 Bruxelles

UEAPME – EUROPEAN ASSOCIATION OF SMALL AND MEDIUM-SIZED ENTERPRISES – Rue Jacques Lalaing, 4 – 1040 Bruxelles

CEEP – EUROPEAN CENTRE OF PUBLIC ENTREPRISES – Rue de la Charité 15, bte 12 – 1040 Bruxelles

Background

In 2003-6, European social partner organisations launched a series of joint projects to help social partner organisations in the Central and East European Countries to identify what they need to do at the national level in order to strengthen their capacity to act as social partners mandated to represent the views of their members in the European social dialogue¹.

These projects concentrated on 8 member states in central and eastern Europe (Poland, Hungary, Czech Republic, Slovakia, Lithuania, Slovenia, Latvia and Estonia), and consisted in organising national-based seminars (held between January 2004 and March 2005) and formulating a series of short- to medium- term employers', trade unions', and joint actions to be pursued by social partners.

Given the success of the first round of national seminars, European social partners continued the project into a second round of national seminars in all 8 countries (held between May 2005 and April 2006) in order to review and assess progress achieved in the implementation of the action plans, and to discuss how these could be carried forward.

The final synthesis report for this project can be found at <http://resourcecentre.etuc.org/> and <http://www.erc-online.eu>.

In 2007, using a similar methodology, European social partners launched a first round of national seminars in the then accession and candidate countries Romania, Bulgaria, Croatia and Turkey. A report of this project can also be found at annex.

In 2004 European social partners also launched a joint study on social and economic change and restructuring in the 10 new member states of the 2004 wave of enlargement². The objective was to provide European social partners with material on the specific challenges of the new Member States in view of a prospective discussion on EU social and employment policies in order to influence the EU social policy agenda and identify relevant issues for future joint work by the social partners.

10 national-based seminars took place between April 2005 and April 2006 in all the new Member States for which national country studies were compiled and discussed during the seminars. A synthesis report was then compiled and presented at the final conference which took place in Brussels on 26 & 27 June 2006, attended by social partner representatives from all EU countries.

The final synthesis report for this project can be found at <http://resourcecentre.etuc.org/> and <http://www.erc-online.eu>.

In 2007, using a similar methodology, European social partners have enlarged the study to cover all EU Member States and agreed to cover over 18 months until June 2008 the following 10 countries: Ireland, The Netherlands, Greece, Italy, France, Austria, Denmark, Spain, UK and Sweden.

Following the success of both these actions, European social partners, in line with the EU social dialogue work programme described in the introduction, intend to implement in 2008

¹ "CEEC social partners' participation in the European social dialogue: What are the social partners' needs" – Phase 1 (Agreement VS/2003/0520) and Phase 2 (Agreement VS/2004/0493).

² "Joint study on restructuring in the new Member States" (Agreement VP/2004/002).

as part of the Integrated Programme of the EU social dialogue (Phase 2) the following two actions:

1. Project 1 "social partners' participation in the European social dialogue: What are Social Partners' Needs?" in Romania, Bulgaria, Croatia and Turkey" – Phase 2;
2. Project 2 "Joint Study on Restructuring in EU Member States" – Final Phase.

In order to conduct both the above actions, European social partners wish to hire a subcontractor for both of these projects and an additional 'mini-study' on collecting best practices. It is furthermore essential that all respondents to this call for tender carry out projects 1, 2 and 3 in order to ensure effective and qualitative coordination and continuity in this work.

Furthermore, the selected subcontractor will enter into two contracts, one with BUSINESSEUROPE for projects 1, 2 and 3, and one with ETUC for projects 1 and 2, according to the repartition of activities to be managed by each organisation (see below). The specific budgets to be managed each by BUSINESSEUROPE and ETUC for both projects are described later.

All seminar and final reports of the above projects are available at the respective resource centre websites: www.erc-online.eu (employers) and <http://resourcecentre.etuc.org/> (trade unions).

Project Descriptions

A short description of the main features of Project 1 follows:

IP1	Joint project "social partners' participation in the European social dialogue: What are Social Partners' Needs?" in Romania, Bulgaria, Croatia and Turkey – Phase 2
Countries concerned	For the national seminars: Turkey, Bulgaria, Croatia, Romania For the EU conference: The 27 EU Member States + Turkey and Croatia
Objectives	The national seminars will have three main objectives: <ul style="list-style-type: none"> • Dissemination of information on the European social dialogue; • Assess the progress on the implementation of the action plans developed during the first round of seminars; • Support for upgrading the capacity of the social partners of these countries to participate in the EU Social Dialogue <p>The aim of the EU conference will be partly to discuss the main results of the 24 capacity building seminars held in the framework of the current and past Integrated Programmes and to debate topical issues in the European social dialogue. The Conference will also mark the occasion for presenting the results of a mini-study on good practices and experiences of social dialogue development, and the outcomes of ESF actions.</p>
Organisation	For the implementation of this project, an expert coordinator will be contracted.

	<p>The expert coordinator is responsible for coordination, supervision, methodology for the work and the animation of national seminars and the EU conference. The expert coordinator will be assisted by an additional expert whose main task will be to help draft reports.</p> <p>The expert coordinator, in constant liaison with the European social partners, will work under the control and supervision of a steering committee comprising representatives of the secretariats of the four European social partner organisations (composed of 4 employers' representatives and 4 trade union representatives).</p> <p>Please refer to the subcontractor terms of reference (Section II onwards) for a more detailed description of the experts' tasks and deliverables.</p>
Meetings	<ol style="list-style-type: none"> 1. <u>Preparatory Meeting</u> (organised by ETUC) <ul style="list-style-type: none"> • 18 participants <ol style="list-style-type: none"> 1. 8 national social partners 2. 8 EU secretariats 3. 1 expert coordinator and 1 assisting expert. • Venue: Brussels • Date: approx. September 2008 – October 2008 • Duration of meeting: 1 day • Languages: English + Romanian, Bulgarian, Turkish 2. <u>National seminars</u> (2 organised by BUSINESSEUROPE, 2 by ETUC): <ul style="list-style-type: none"> • 40 participants <ol style="list-style-type: none"> 1. 30 national social partners (15 trade unions, 15 employers) 2. 8 EU secretariats 3. 1 expert coordinator and 1 assisting expert. • Venue: capital of country concerned • Dates: between October 2008 and February 2009 • Duration of seminar: one day • Languages: English + national language 3. <u>Steering committee</u> meeting ahead of the final conference (organised by BUSINESSEUROPE) 4. <u>EU conference</u> (organised by BUSINESSEUROPE): <ul style="list-style-type: none"> • 150 participants <ol style="list-style-type: none"> 1. 136 national social partners (68 trade unions, 68 employers) 2. 8 EU secretariats 3. 1 expert coordinator and 1 assisting expert. 4. 4 invited speakers • Venue: Brussels • Dates: 2009 (to be specified) • Duration of conference: 2 days • Interpretation: 10 languages

A short description of the main features of Project 2 follows:

IP2	Joint Study on Restructuring in EU member states Final Phase – 7 countries
Countries concerned	<p>For the national seminars Belgium, Finland, Germany, Luxembourg, Portugal, Romania and Bulgaria.</p> <p>For the final synthesis seminar: All EU 27 Member States</p>
Objectives	<p><u>Preparation of national studies:</u></p> <ol style="list-style-type: none"> 1. introduction describing the country's economic and social context, 2. description of national situation in terms of social dialogue and restructuring phenomena, including specific cases of change or restructuring in companies, sectors or regions.
Organisation	<p>For the implementation of this project, an expert coordinator will be contracted, who will be assisted by four country experts (2 for the part managed by ETUC and 2 for the part managed by BUSINESSEUROPE).</p> <p>The expert coordinator is responsible for coordination, supervision and the methodology for the work.</p> <p>The country experts are in charge of gathering data and documentation to draft the national studies, as well as presenting them during the national seminars and amending them as necessary. They will also prepare and make presentations during the final synthesis seminar.</p> <p>The expert coordinator works in constant liaison with the European social partners, and under the control and supervision of a steering committee comprising representatives of the secretariats of the four European social partner organisations (composed of 4 employers' representatives and 4 trade union representatives).</p> <p>Please refer to the subcontractor terms of reference (Section II onwards) for a more detailed description of the experts' tasks and deliverables.</p>
Meetings	<p><u>1. Preparatory Meeting</u> (organised by ETUC)</p> <ul style="list-style-type: none"> • 23 participants <ol style="list-style-type: none"> 1. 14 national social partners 2. 8 EU secretariats 3. 1 expert coordinator. • Venue: Brussels • Date: approx. September 2008 – October 2008 • Duration of meeting: 1 day • Interpretation: 5 languages <p>2. Three steering committee meetings are foreseen in Brussels:</p>

- one preparatory meeting at the beginning of the project (organised by ETUC)
- one meeting during the project (organised by BUSINESSEUROPE)
- one concluding meeting (organised by ETUC)

The expert coordinator and the four country experts will meet regularly in coordination meetings. Three of such meetings are foreseen:

- one preparatory meeting (organised by BUSINESSEUROPE)
- one meeting during the project (organised by BUSINESSEUROPE)
- one concluding meeting (organised by ETUC)

The four country experts will prepare the country studies on the basis of the expert coordinator's methodology with a view to meeting the project's objectives. The national social partners will be involved during the preparation of the country studies.

The studies (one per country) will be presented and discussed during national seminars

For each of the two larger countries (DE, RO):

- 53 participants
 1. 40 national social partners
(20 trade unions, 20 employers)
 2. 8 EU secretariat
 3. 1 expert coordinator
 4. 4 country experts
- Venue: capital of the country concerned
- Dates: Between November 2008 – September 2009
- Duration of seminar: 1.5 days
- Languages: English + national language

For each of the five other countries (LX, BG, BE, FI, PT):

- 43 participants
 1. 30 national social partners
(15 trade unions, 15 employers)
 2. 8 EU secretariat
 3. 1 expert coordinator
 4. 4 country experts
- Venue: capital of the country concerned
- Dates : Between November 2008 – September 2009
- Duration of seminar: 1.5 days
- Languages: English + national language

The studies will then be finalised by the country expert entrusted with the task of preparing the country study in liaison with the expert coordinator and in agreement with the steering committee taking into account the elements submitted by the national social partners during the seminars.

The results of these seven studies together with the overall

comparative results of the 27 countries involved will then be presented at an EU conference involving social partners from all EU member states:

- 150 participants
 1. 130 national social partners
(65 trade unions, 65 employers)
 2. 7 speakers
 3. 8 EU secretariat
 4. 1 expert coordinator
 5. 4 country experts
- Venue: Brussels
- Dates: approx. November 2009
- Duration of conference: 2 days
- Interpretation in 10 languages.

A short description of the main features relating to the "Mini Study" (Project 3) follows:

IP3(f)	Mini study on national social dialogue good practices
Countries concerned	<u>EU-12</u> : Poland, Hungary, Czech Republic, Slovakia, Lithuania, Slovenia, Latvia, Estonia, Malta, Cyprus, Romania and Bulgaria.
Objectives	The main objective of the mini-study is to collect best practices, focusing specifically on the EU 12 new member states, of the initiatives and mechanisms that have been developed in the relevant countries to build social partnership and to reinforce social dialogue procedures be it on a bipartite or tripartite basis. The study provides an opportunity to compile a set of good practices in a short compendium to enable social partners in other countries to learn from such experiences and to adopt similar actions.
Organisation	<p>For the implementation of this project, an expert coordinator will be contracted for 24 days' expertise.</p> <p>The expert coordinator is responsible for research, analysis and compiling a compendium for this activity. The final document should be between 10 and 20 pages, and should be submitted to European social partners for approval in advance of the Final EU Conference described above (Project 1).</p> <p>The expert coordinator will work in liaison with the European social partners to establish contact persons and a methodology for the study.</p> <p>To be managed by BUSINESSSEUROPE on behalf of all European social partner organisation.</p> <p>Please refer to the subcontractor terms of reference (Section II onwards) for a more detailed description of the experts' tasks and deliverables.</p>

B./ Description of project partnership

The aforementioned projects will be jointly managed by BUSINESSEUROPE and ETUC on behalf of the four European social partner organisations. Both BUSINESSEUROPE and ETUC will therefore each identify a project administrator and secretariat staff to carry out the projects within their respective organisations. The accounting for the project and production of the final report to be sent to the commission will also be carried out by BUSINESSEUROPE and ETUC.

In addition, all four organisations in the project partnership (BUSINESSEUROPE, ETUC, UEAPME and CEEP) will provide expertise for the national seminars and the steering group meetings in Brussels. At the national level the members of all four European social partner organisations will support the organisation of the national seminars by allocating manpower as well as expertise.

II./ Purpose of the tender

The tender aims at finding a subcontractor to carry out both Joint Projects of the European Social Partner Organisations:

1. Project 1 "social partners' participation in the European social dialogue: What are Social Partners' Needs?" in Romania, Bulgaria, Croatia and Turkey" – Phase 2;
2. Project 2 "Joint Study on Restructuring in EU member states" – Final Phase;
3. Project 3 "Mini-study" on national social dialogue good practices.

In order to ensure a large visibility to this tender, the European social partners will publish the tender specifications on their respective websites. BUSINESSEUROPE and ETUC, the project promoters, will each keep the tender online for 45 days on their respective websites.

III./ Tasks to be performed by the subcontractor

A./ Description of the tasks to be performed by the subcontractor

For the benefit of the reader, please note that references to "expert coordinator" in the text are synonymous to the "subcontractor".

Project 1 (What are the social partners' needs?)

The subcontractor should provide the following services for the applicant organisations:

- to propose a methodology to organise the interactive national seminars, coherent with the methodology that was developed during the recent project in EU 10 (2003-5),
- to animate the national seminars and to facilitate discussions during these seminars in order to ensure a genuinely interactive nature of this exercise,
- to provide expertise on the issues dealt with (industrial relations systems in the target countries and social dialogue at EU level),
- to appoint an assisting expert, with the approval of the steering committee, to participate in all meetings and seminars and to help with report drafting,
- to provide the necessary reporting of the activities and draft the meeting documents and conclusions,

- to assist project administrators in BUSINESSSEUROPE and ETUC in organising meetings and national seminars.

Project 2 (study on restructuring in EU member states)

The subcontractor should provide the following services for the applicant organisations:

- to develop an interactive methodology, coherent with the methodology that was developed during the study conducted so far in 20 EU countries (2004-8), to carry out the study on restructuring in EU 27 and to ensure that the final synthesis study reflects the outcomes of the research and discussions at both national and at EU level,
- to select, with the approval of the steering committee, a team of 4 country experts, 2 of whom will be responsible on a country basis for parts of the project managed by BUSINESSSEUROPE, 2 of whom will be responsible on a country basis for parts of the project managed by ETUC,
- to provide expertise, with the help of the selected country experts, on the issues dealt with (managing change and restructuring in EU 27 and in particular in EU 15, social dialogue and industrial relations in EU 27 and at European level),
- to manage the network of experts, ensure the quality of the work delivered and provide the necessary reporting of the activities and draft the meeting documents and conclusions,
- to draft the progress study, which highlights characteristics and issues shared by the 7 target countries and the case studies
- to draft the synthesis study, which highlights characteristics and issues shared by all the EU 27 countries and the case studies,
- to assist project administrators in BUSINESSSEUROPE and ETUC in organising the national seminars bringing together the European social partners and representatives of the social partners in the 7 target countries,
- to assist project administrators in BUSINESSSEUROPE and ETUC in organising the other meetings,
- to organise 3 experts' coordination meetings with country experts.

Project 3(f) (mini study on national social dialogue good practices)

The subcontractor should provide the following services for the applicant organisations:

- to conduct research and analysis to collect best practice examples, focusing on the EU 12 new Members States, of initiatives and mechanisms that have been developed in the relevant countries to build social partnership and reinforce social dialogue,
- to provide expertise on the issues dealt with (industrial relations systems in the target countries and social dialogue at EU level),
- to compile a draft compendium, of between 10 and 20 pages, synthesising the results of the study, ensuring bipartism in the process,
- to submit the draft compendium to European social partners for review and finalisation in advance of the Final EU Conference (described under Project 1)

B./ Detailed description of the tasks to be performed by the subcontractor

The subcontractor will work under the supervision of the steering committee, comprised of representatives of the four European social partner organisations, and in coordination with the respective project managers and administrators in both BUSINESSSEUROPE and ETUC.

Project 1 (What are the social partners' needs?)

The subcontractor will be responsible for appointing an assisting expert whose main task will be to help draft reports.

For the preparatory meeting, the tasks to be performed by the subcontractor are the following:

- to propose a methodology on how to organise the interactive national seminars, coherent with the methodology that was developed during the recent project in EU 10 (2003-6),
- to coordinate with BUSINESSEUROPE and ETUC on the organisation of the meeting and the preparation of documents for national social partner representatives, in order to start planning national seminars (dates, logistics, participants, etc.),
- to present the results of the previous project in EU 10 (2003-6) to national social partners from target countries in order to familiarise them with the background of the project, the outcomes achieved, and to provide an outline as to how the project will be run in the context of their countries.

For the national seminars, the tasks of the subcontractor are the following:

- Preparation of the seminars in accordance with the methodology defined (including drafting of discussions documents etc.),
- Provide expertise for the content of presentations to be performed by experts from European social partner organisations,
- Animation of the national seminars,
- Drafting of post-seminar reports (max. 40 pages per seminar) with the help of an assistant expert who will be also responsible for compiling a detailed record of the discussions that took place during the seminars,
- Provision of expertise. Attention will be given to identifying and integrating an analysis of the actual problems in the social field currently faced by employers' and trade unions' organisations in the target countries. Expertise is essential on the different national industrial relations systems, as well as on social dialogue at EU level. This expertise should be reflected when preparing materials and discussion papers for the seminars, in the selection of the expert coordinator and the assisting expert.
- Provide assistance to the project coordinators of BUSINESSEUROPE and ETUC in the organisation of the national seminars.

For the EU Conference, the tasks of the subcontractor are the following:

- Preparation of a draft synthesis report of max. 100 pages (drafting, translation, publication etc.), which should make use of the findings of the national reports and serve as a discussion paper for the EU Conference, incorporating the results achieved in the recent project in EU 10 (2003-5),
- to coordinate with BUSINESSEUROPE and ETUC on the organisation of the conference and the preparation of documents for national social partner representatives who will be in attendance,
- to coordinate with the steering committee the selection of guest speakers, as well as coordinating with speakers the content of their presentations and interventions in line with the rationale of the conference,
- to coordinate with BUSINESSEUROPE and ETUC the seminar programme to integrate the dissemination of complementary project activities (ESF, Mini study).

Project 2 (study on restructuring in EU member states)

The subcontractor will be responsible, with the approval of the steering committee, for appointing 4 country experts to undertake the national country studies for the 7 countries covered in this project. 2 will be responsible on a country basis for parts of the project managed by BUSINESSEUROPE, 2 will be responsible on a country basis for parts of the project managed by ETUC.

The country experts will work under the supervision of the subcontractor.

For the country studies,

- The tasks to be performed by the **subcontractor** are the following:
 - to propose, with the approval of the steering committee, a network of 4 country experts able to perform the task; to manage the network and to ensure the quality of its work,
 - to propose a methodology on how to draft the country studies, involving the relevant national social partners, coherent with the methodology that was developed during the recent projects in the 20 countries covered between 2004 and 2008,
 - to propose a methodology on how to identify, manage and draft the brief descriptions of concrete cases of change or restructuring in companies, sectors or territories (face-to-face meetings with local players etc.) thereby ensuring the relevance and quality of the case studies,
 - to organise two experts' coordination meetings. One should be conducted before the first country studies are compiled. A further meeting should be conducted at an interim stage to discuss, evaluate and adapt as necessary the methodology and procedures in place for the forthcoming set of national seminars.

- The tasks to be performed by the **country experts** are the following:
 - to draft the country studies (max. 60 pages) following the defined methodology, involving the relevant national social partners (employers and trade unions) thereby ensuring the involvement of the national social partners and respecting bipartism,
 - to follow the methodology on how to identify, manage and draft the brief descriptions of concrete cases of change or restructuring in companies, sectors or territories (face-to-face meetings with local players etc.) thereby ensuring the relevance and quality of the case studies,
 - to prepare and attend the aforementioned experts' coordination meetings in accordance with the guidelines set out by the expert coordinator and steering committee,
 - To undertake preparatory country visits of 3 days to collect data and conduct interviews with national social partners (employers and trade unions),

For the national seminars,

- The tasks of the **subcontractor** are the following:
 - Preparation of the seminars in accordance with the methodologies defined (including drafting of discussions documents etc.)
 - Animation of the national seminars,
 - Drafting of a seminar report (max. 10 pages per seminar) with the help of the country experts,

- Provision of expertise. Expertise is essential on the different national industrial relations systems, as well as on social dialogue at EU level. This expertise should be reflected when preparing discussions papers for the seminars, when moderating the seminar and drafting the report,
 - Integration of the results of the discussions in the final country studies, to be undertaken with the assistance of the country experts,
 - Assistance with the practical organisation of the national seminars.
- The tasks of the **country experts** are the following:
- to present and discuss the respective country studies during national seminars,
 - to finalise, under the supervision of the expert coordinator, the country study integrating comments made by the national social partners during the seminar.

For the synthesis study,

- The tasks of the **subcontractor** are the following:
- To draft the synthesis study (max. 100 pages) of the country dossiers structured around priority themes common to the EU 27, and integrate the results of the previous study on restructuring in the 20 countries covered between 2004 and 2008,
 - To identify concrete cases of change or restructuring to enrich the synthesis.

For the synthesis seminar,

- The tasks of the **subcontractor** are the following:
- Organise a third and final experts' coordination meeting in advance of the synthesis seminar to discuss the draft synthesis study, as well as case studies and presentations to be made by the subcontractor and country experts during the synthesis seminar,
 - Coordinate with BUSINESSEUROPE and ETUC on the organisation of the synthesis seminar and the preparation of documents for national social partner representatives who will be in attendance,
 - Coordinate with the steering committee the selection of guest speakers, as well as coordinating with speakers the content of their presentations and interventions in line with the rationale of the conference.
 - Animation of the seminar,
 - Provision of expertise. Expertise is essential on the different national industrial relations systems, as well as on social dialogue at EU level,
 - Integration of the results of the discussions in the final synthesis study.
- The tasks of the **country experts** are the following:
- To attend the aforementioned experts' coordination meeting in advance of the synthesis seminar,
 - to present and discuss the respective country studies and case studies during the synthesis seminar.

Project 3(f) (mini study on national social dialogue good practices)

The subcontractor should provide the following services for the applicant organisations:

- to conduct research and analysis to collect best practice examples, focusing on the EU 12 new Members States, of initiatives and mechanisms that have been developed in the relevant countries to build social partnership and reinforce social dialogue,

- to provide expertise on the issues dealt with (industrial relations systems in the target countries and social dialogue at EU level),
- to compile a draft compendium, of between 10 and 20 pages, synthesising the results of the study, ensuring bipartism in the process,
- to submit the draft compendium to European social partners for review and finalisation in advance of the Final EU Conference (described under Project 1)

IV./ Expertise and experience required

Subcontractor

Sound experience is required in the following areas:

- Formulating and carrying out a tailored methodology in order to run interactive national seminars, in line with the methodologies that were developed during the recent projects undertaken by European social partners in 22 countries between 2003 and 2008,
- Running and animating national seminars on both the themes of EU social dialogue, and managing change and restructuring,
- Coordination and running of large-scale events involving external speakers and 150+ participants from EU 27 on the above themes,
- Successful track record of delivering in similar projects run over a 18+ month period.

Sound expertise is required on the following issues:

- Sound understanding of the methodology implemented in recent projects undertaken by European social partners in 22 countries between 2003 and 2008,
- Expert knowledge of industrial relations systems in the target countries and the social dialogue at EU level,
- Ability to identify and integrate analyses of the actual problems in the social field currently faced by employers' and trade unions' organisations in the target countries,
- Project management,
- Ability to identify and manage an assisting expert for project 1 whose task it will be to record discussions during national seminars and to help draft reports,
- Ability to identify and manage 4 country experts with appropriate experience and expertise (as defined below).

Country experts (to be selected by the subcontractor with the approval of the steering committee)

Sound experience is required on the following issues:

- Ability to implement the above-mentioned methodologies for the country dossiers and the case studies,
- Evidence of experience in managing, conducting such wide-ranging studies,
- Ability to work within specified deadlines and to respect budgetary limits.

Sound expertise is required on the following issues:

- Good knowledge of industrial relations systems in the target countries and the EU 27, in particular concerning managing change and restructuring,
- Good knowledge of social dialogue at EU level,
- Researching skills,
- Report drafting skills (in English).

V./ Time schedule

The subcontractor will be asked to work from 01/09/2008 to 31/01/2010. The subcontractor will be responsible for managing the network of experts within the above time frame.

VI./ Payment

The total maximum budget available for expertise is as follows:

Project 1		€
Expert Coordinator	550€ x 32 days	17,600
Assisting Expert	350€ x 30 days	10,500
TOTAL Project 1		28,100
Project 2		
Expert Coordinator	550€ x 90 days	49,500
Country Experts	350€ x 190 days	66,500
TOTAL Project 2		116,000
Project 3		
Expert Coordinator	550€ x 24 days	13,200
TOTAL Projects 1, 2 and 3		157,300

As mentioned in Part A, the subcontractor will have to enter in 2 contracts, one with BUSINESSEUROPE for projects 1 and 2, and one with ETUC for projects 1 and 2, according to the repartition of activities to be managed by each organisation as follows:

Contract with BUSINESSEUROPE	Contract with ETUC
Project 1	Project 1
<ul style="list-style-type: none"> ➤ National Seminar Bulgaria ➤ National Seminar Turkey ➤ Steering Committee Meeting 2 ➤ Final EU Conference 	<ul style="list-style-type: none"> ➤ Steering Committee Meeting 1 ➤ Preparatory Meeting ➤ National Seminar Romania ➤ National Seminar Croatia
Project 2	Project 2
<ul style="list-style-type: none"> ➤ Experts' Coordination Meetings 1 & 2 ➤ National Study & Seminar Luxembourg ➤ National Study & Seminar Germany ➤ Steering Committee Meeting 2 ➤ National Study & Seminar Belgium ➤ National Study & Seminar Bulgaria 	<ul style="list-style-type: none"> ➤ Steering Committee Meeting 1 ➤ Preparatory Meeting ➤ National Study & Seminar Finland ➤ National Study & Seminar Portugal ➤ National Study & Seminar Romania ➤ Experts' Coordination Meetings 3 ➤ Steering Committee Meeting 3 ➤ Final Synthesis Seminar ➤ Final Synthesis Study
Project 3	
<ul style="list-style-type: none"> ➤ <u>Mini</u> Study on national social dialogue good practices 	

For more precise information on the approximate timing of the above events, please see the indicative calendar of activities at annex.

Please see the table below for payment details:

Contract with BUSINESSEUROPE			Contract with ETUC		
Project 1		€	Project 1		€
Expert Coordinator	550€ x 16 days	8,800	Expert Coordinator	550€ x 16 days	8,800
Assisting Expert	350€ x 15 days	5,250	Assisting Expert	350€ x 15 days	5,250
TOTAL Project 1		14,050	TOTAL Project 1		14,050
Project 2			Project 2		
Expert Coordinator	550€ x 35 days	19,250	Expert Coordinator	550€ x 55 days	30,250
Country Experts	350€ x 100 days	35,000	Country Experts	350€ x 90 days	31,500
TOTAL Project 2		54,250	TOTAL Project 2		61,750
Project 3					
Expert Coordinator	550€ x 24 days	13,200			0
TOTALS 1, 2, 3		81,500			75,800

In accordance with the above table, the subcontractor will enter into a contract with **BUSINESSEUROPE** for a total of € 81,500. The subcontractor will also enter into a contract with **ETUC** for a total of € 75,800.

The subcontractor will receive an advance, interim and final payment for the parts of the project managed by **BUSINESSEUROPE**.

The subcontractor will also receive an advance, interim and final payment for the parts of the project managed by **ETUC**.

VII./ Price

Contract with **BUSINESSEUROPE:** € 81,500.

Contract with **ETUC:** € 75,800.

TOTAL: **€ 157,300.**

VIII./ Selection criteria

Subcontractor

The offers will be examined against the following criteria:

- Ability to propose a tailored methodology to have genuinely interactive national seminars for both projects 1 and 2, fully in line with the methodologies that were developed during the recent projects undertaken by European social partners in 22 countries between 2003 and 2008,
- Evidence of extensive experience in running and animating such interactive national seminars on both the themes of EU social dialogue (project 1), and managing change and restructuring (project 2),
- Proven track record of ensuring the quality of written materials prepared, both in terms of content and format (i.e. deliver publishable documents),
- Expert knowledge of industrial relations systems in the target countries and the social dialogue at EU level,
- Ability to identify and integrate analyses of the actual problems in the social field currently faced by employers' and trade unions' organisations in the target countries,
- Project management experience essential,
- Ability to identify and manage an assisting expert for project 1 whose task it will be to record discussions during national seminars and to help draft reports,
- Ability to identify and manage 4 country experts with appropriate experience and expertise (as defined in section IV),
- Successful track record of similar project management experience is essential, involving +18-month duration,
- Ability to conduct meetings and draft all documents in English,
- Good administration skills,
- Respect of the budgetary constraints.

IX./ Award Criteria

The contract will be awarded to the tender offering the best value for money, taking into account the specific object, requirements and selection criteria of the tender. The principles of transparency and equal treatment will be respected with a view to avoiding any conflicts of interest.

X./ Content and selection of the bids

Offers must be received within 45 days of the date of publication of this call for tender on the BUSINESSSEUROPE and ETUC websites – by 1 September 2008. Offers can be sent to either BUSINESSSEUROPE or ETUC.

To ensure confidentiality, bidders must submit their offer in a double envelope. Both envelopes must be sealed and the inside envelope shall not only bear the name of the department for which it is intended (see below), but also the words "*Tender – not to be opened by the Mail Department*" (Appel d'offres – à ne pas ouvrir par le service du courrier). If self-adhesive envelopes are used, they must be sealed with adhesive tape crossed by the signature of the sender.

A committee will be formed comprising four representatives of the European Social Partners. One or more members of this committee will initial the documents, confirming the date and time of each bid. The committee members will sign the report on the bids received, which will list the admissible bids and provide reasons for rejecting bids owing to their failure to comply with the stipulations of the tendering process.

This committee will also evaluate the tenders that have been deemed admissible. An evaluation report and classification of participation requests will be drawn up, dated and signed by all the members of the evaluation committee and kept for future reference.

This report will include:

1. The name and address of the contracting authority, the purpose and value of the contract or framework contract;
2. the names of any excluded candidates and the reasons for their rejection;
3. the names of candidates selected for consideration and the justification for their selection;
4. the names of candidates put forward and justification of their choice in terms of the selection or award criteria.

The contracting authorities will then make their decision.

All candidates must either deliver their bid by hand or submit them by registered letter to both:

BUSINESSEUROPE Jørgen Rønnest Acting Director Social Affairs Department Avenue de Cortenbergh 168 B – 1000 Brussels BELGIUM	ETUC Maria Helena André Deputy General Secretary International Trade Union House Boulevard du Roi Albert II, 5 B – 1210 Brussels BELGIUM
--	---

For requests sent by registered mail, the postmark will serve as proof of the date of dispatch.

XI./ Annexes

- European social partners' work programme 2006-2008.
- Final synthesis report for project "Social dialogue in Central and East European Countries: what are social partners' needs?" (2003-6)
- Final synthesis report for project "joint study on restructuring in the new member states" (2004-6)
- Indicative Calendar of activities for the Integrated Programme of the EU social dialogue (Phase 2) (current proposal).

Please also note that more information on past and current joint project activities is available at the respective resource centre websites:

- www.erc-online.eu (employers) and
- <http://resourcecentre.etuc.org/> (trade unions).