



Integrated Programme of the EU Social Dialogue 2009 – 2011
Tender Specifications for subcontracting external expertise
IP1 - Joint Study
"The employment impact of climate change policies" – Phase 1

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Deadline to respond:	24 October 2009

** under reserve of signature of contract*

I./ BACKGROUND

A./ Introduction

In the framework of their joint EU Social Dialogue Work Programme 2009-2010 (at annex), the European Social Partners have undertaken to:

- *"develop a joint approach to the social and employment aspects and consequences of climate change policies with a view to maximising opportunities and minimising negative effects and to identify possible joint actions."*

European social partners have therefore responded to a call for proposal of the European Commission (Budget Line 04/03/03/01) to obtain the necessary funding in order to be able to carry out this action (decision expected in November 2009). In the framework of this call, they expressed their intention to select a subcontractor.

The current call for tender constitutes the subcontracting work needed to carry out the 18-month joint study entitled "**The employment impact of climate change policies**" – **Phase 1**, which will be being undertaken under the European social partners' "Integrated Programme of the EU social dialogue 2009-2011".

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

B./Project Description

The factors affecting the evolution of modern economies and societies are multifaceted and complex. European labour markets are faced with many challenges, such as technological change, globalisation and demographic ageing.

In addition, climate change has more recently risen to the top of the policy agenda. Moving towards a low-carbon economy will imply a process of job creation, job destruction and job adaptation.

Overall, little is known about the impact of climate change policies on employment and future skills needs thereof. However, what is clear is that social partners have an important role to play in this respect.

Accordingly, European social partners have jointly decided to undertake an exploratory study to start assessing not only how social partners are already active on this issue, but to also look at what is the scope of action for the social partners in order to help manage the transition towards a low-carbon economy.

The purpose of the present call is to enable European social partners to undertake the action that is due to span 18 months (December 2009 – May 2011). The methodology, activities and budget have been designed with this time-frame in mind and budgetary responsibility for activities and deliverables will be shared between BUSINESSEUROPE and ETUC.

C./ Objective

The overarching objective is to help European social partner organisations to better understand the impact of climate change policies on labour markets and to assess what is and can be the role of social partners at national level in this respect. Achieving a better understanding of this interrelationship could lead to a series of joint actions, as a bi-product of the study.

A large part of the rationale of this initiative is to capture positive examples of how companies and / or social partners are approaching the issue across a range of industries, sectors, and / or territories. In addition it is anticipated in terms of outcomes that conclusions can be drawn on the consequences for employment (policies) and general and / or specific skills development.

It should be borne in mind that this is the first time that the issue of climate change will be discussed within the framework of the European social dialogue. It is also anticipated at this stage that European social partners will seek to carry out subsequent actions following the completion of the proposed action.

The present proposal specifically seeks, through the help of a subcontracted expert, to help social partner organisations to:

- Assess the impact of climate change policies (e.g. environmental sustainability, energy efficiency, reducing emissions) on labour market policies in Europe;
- Assess the impact on future skills needs (in line with the 2008 Communication New Skills for New Jobs);

- Identify and discuss any present or future actions and / or ways in which social partners can work, separately or jointly, to better address climate change policies and their impact on employment.

Two seminars bringing together between 80 and 100 social partner representatives of European countries will also enable to present the research results of the joint study activities undertaken. The objective of each event is explained in more detail below.

D./ Method

ETUC and BUSINESSEUROPE will jointly manage the project on behalf of all social partners. The methodology to be used for the part managed by ETUC and the part managed by BUSINESSEUROPE has to be rigorously identical and is described below.

The preparatory and research-based work necessary to complete the study will be entrusted to the expert coordinator working under the supervision of a small steering committee in accordance with the methodology described below.

In order to meet the objectives described in the work programme and taking into account the success achieved when carrying out similar activities with their respective constituencies, European social partners will use the following methodology:

- **Literature Review and Survey**

The first stage of the study will be to start mapping out, through conducting a literature review and consultations with national social partner organisations affiliated to European social partners, what the perceived impact of climate change policies is on labour markets, and how respective members are already separately or jointly active in approaching the issue at different levels. The subcontracted expert, in close coordination with the steering committee, will prepare a fact-finding survey to be addressed to national social partners of EU member states and candidate countries. Together with preliminary research results of the literature review, the survey findings should be available by May 2010, in advance of the first of two EU-level seminars as described below.

The research component of reviewing relevant literature will continue beyond May 2010 and will integrate the results of both EU-level seminars before it is finalised.

- **2 EU-level seminars**

1) The first of these seminars will intend to examine 10 concrete case studies of ways in which climate change has had an impact on a company / sector / territory. The aim would be to have 10 joint (employer/trade union) presentations explaining the cases. The above-mentioned research and survey findings will also be presented and discussed. In close coordination with the steering committee, a background paper will therefore be prepared by the subcontracted expert outlining the main preliminary findings of the survey and literature review to date.

It is anticipated that the seminar would take place by May / June 2010 and it would be foreseen that up to 100 participants would attend. This seminar will be organised and coordinated by BUSINESSEUROPE on behalf of the EU social partners.

2) The second and final seminar would not be scheduled to take place before March / April 2011, shortly before the end of the overall project. The objective of this stock-taking event would be to present the draft final expert coordinator's research report where a series of conclusions are expected to be drawn, notably on possible future actions that will be examined and debated among social partners.

It would also be foreseen that up to 80 participants would attend. This seminar will be organised and coordinated by ETUC on behalf of the EU social partners.

E./ ACTIVITIES

A short description of the main features of the project follows:

Kick-off Steering Committee meeting (organised by ETUC)

- 9 participants
 1. 8 EU secretariats
 2. 1 expert coordinator
- Venue: Brussels
- Date: December 2009
- Duration of meeting: 1 day
- Interpretation: None

Three further 1-day Steering Committee meetings are foreseen in Brussels with the same format:

- one meeting before the EU seminar 1 (organised by BUSINESSEUROPE)
- one meeting before the EU seminar 2 (organised by BUSINESSEUROPE)
- one concluding meeting (organised by ETUC)

Travel Fund (jointly managed by BUSINESSEUROPE / ETUC)

A travel fund for up to ten 2-day trips will be available for the expert coordinator to visit certain EU countries as required to consolidate research results and organise face-to-face meetings with national social partner organisations. BUSINESSEUROPE and ETUC will split budgetary responsibility equally (5 / 5).

EU Seminar 1 (organised by BUSINESSEUROPE)

- 100 participants from EU 27, Turkey, Croatia (and EEA countries)*
 - 20 case study presenters
 - 68 national social partners (34 trade unionists, 34 employers)
 - 8 EU secretariat
 - 1 expert coordinator
 - 3 guest speakers
- Venue: Brussels
- Dates: Approx. May – June 2010
- Duration of seminar: 2 days
- Languages: 5 languages

EU Seminar 2 (organised by ETUC)

- 80 participants from EU 27, Turkey, Croatia and EEA*
 1. 68 national social partners (34 trade unionists, 34 employers)
 2. 8 EU secretariat

* EEA social partners' representatives will be invited to take part in the action but not included in the budget

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3. 1 expert coordinator
 4. 3 guest speakers
- Venue: Brussels
 - Dates: Approx. March – April 2011
 - Duration of seminar: 2 days
 - Languages: 5 languages

Provisional Calendar of activities IP1 - Climate Change	
2009	
1 September	• Launch of Call for Tender
November	• Selection Committee choice of subcontracted expert coordinator
December	• Kick-off Steering Committee Meeting # 1 with expert coordinator (ETUC) • Methodology finalisation
2010	
January	• Drafting of survey by subcontracted expert (EN/FR)
Jan / Feb	• Launch survey to affiliates of European social partner organisations
March / April	• Deadline for survey responses
April / May	• Steering Committee meeting # 2 with expert coordinator (BUSINESSEUROPE)
May / June	• EU Seminar # 1 (BUSINESSEUROPE)
December	• Draft research report to be submitted by expert coordinator to steering committee
2011	
Jan/Feb	• Steering Committee meeting # 3 with expert coordinator (BUSINESSEUROPE)
March / April	• EU Seminar # 2 (ETUC)
April / May	• Steering Committee meeting # 4 with expert coordinator (ETUC) • Finalisation Research Report

F./ Organisation

For the implementation of this project, an expert coordinator will be contracted for 50 days' expertise.

The expert coordinator will be responsible for the methodology and research components of the Study as well as general coordination and animation of the two EU seminars.

The expert coordinator is also responsible for the final research report to be produced as the main deliverable resulting from the Study. The final synthesis research report should be between 40 and 60 pages, and should be submitted to European social partners for approval prior to the conclusion of the overall project.

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).

Please refer to the subcontractor terms of reference (Section II onwards) for a more detailed description of the experts' tasks and deliverables.

G./ Description of project partnership

This activity 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 activity 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 BUSINESSSEUROPE and ETUC.

In addition, all four organisations in the project partnership (BUSINESSSEUROPE, ETUC, UEAPME and CEEP) will provide expertise for the research component, seminars and the steering group meetings in Brussels.

II./ Purpose of the tender

The tender aims at finding a subcontractor to carry out the joint study of the European social partner Organisations: **"The employment impact of climate change policies"** – Phase 1.

In order to ensure a large visibility to this tender, the European social partners will publish the tender specifications on their respective websites. BUSINESSSEUROPE 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

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

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

For the literature review, the tasks to be performed by the subcontractor are the following:

- The literature review should be regarded as 'ongoing' in order that preliminary elements in the form of a background paper can already be presented during EU Seminar 1 (May / June 2010) together with the survey results and 10 case studies, while the overall literature review can be formally presented in a report format during EU Seminar 2 (March / April 2011) towards the end of the project;
- The subcontractor will have at his / her disposal the possibility to undertake up to 10 2-day funded visits to certain countries to organise face-to-face meetings with national social partners to complement desk research, if and as required;
- The full bibliography of the literature review should be appended to the final synthesis research report.

For the kick-off steering committee meeting (December 2009), the tasks to be performed by the subcontractor are the following:

- to coordinate with BUSINESSSEUROPE and ETUC on the agenda and organisation of the meeting;
- to propose a detailed methodology for the principal events (meetings, seminars) and deliverables (survey, research report) to be undertaken in the course of the project, coherent with the aims set in the project description, to carry out the overall study on the employment impact of climate change policies in the 29 countries covered;
- to present a preliminary draft of the preparatory survey.

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

- following the kick-off steering committee meeting, to propose a consolidated draft of the survey to the steering committee;
- to compile the final survey to be addressed to national affiliates of European social partners in the 29 countries covered in close coordination with the steering committee;

- to conduct an analysis of survey responses and present the main conclusions to be included in the background paper for EU seminar 1.

For the remaining steering committee meetings, the tasks to be performed by the subcontractor are the following:

- to coordinate with BUSINESSEUROPE and ETUC on the agenda and organisation of the meetings;
- to update the steering committee of the state of play of the literature review and general research methodology;
- to present draft background materials in advance of the two EU seminars (see below);
- to assist project administrators of BUSINESSEUROPE and ETUC to plan the EU seminars and follow-up activities (coordination of dates, logistics, participants, materials etc.).

For the EU seminar 1, the tasks to be performed by the subcontractor are the following:

- to assist the steering committee in coordination with European social partners' national affiliates to identify and collect 10 concrete case studies of company / sectoral / territorial cases to be presented during the seminar;
- to apply wherever possible a balanced approach when identifying and proposing cases to capture a geographical spread of examples across a range of different industries, sectors, and / or territories;
- to provide expertise on the issues dealt with during the seminar (e.g. climate change, sustainable development, labour market issues, industrial relation systems, social dialogue, skills). Special attention should be given to analysing the problems faced and solutions sought by social partners when assessing and addressing the interrelationships between climate change policies and social and labour market policies in national contexts;
- to assist project administrators of BUSINESSEUROPE and ETUC in organising the seminar and identifying guest speakers / case study presenters;
- to propose a seminar methodology (including the drafting of a background paper as a basis for discussion, a draft agenda; and topics to be dealt in the seminar sessions);
- to animate the seminar and to facilitate discussions in order to ensure a genuinely interactive nature of this exercise;
- to draft a post seminar report of proceedings (max. 10 pages);
- to liaise with the steering committee when coordinating with speakers the content of presentations / interventions in line with the rationale of the seminar.

For the EU seminar 2, the tasks to be performed by the subcontractor are the following:

- to provide expertise on the issues dealt with during the seminar (e.g. climate change, sustainable development, industrial relation systems, labour market issues, social dialogue, skills). Special attention should be given to analysing the problems faced and solutions sought by social partners when assessing and addressing the interrelationships between climate change policies and social and labour market policies in national contexts;
- to assist project administrators of BUSINESSEUROPE and ETUC in organising the seminar and identifying guest speakers;
- to propose a seminar methodology (including the drafting of the synthesis research report as a basis for discussion, a draft agenda; and topics to be dealt in the seminar sessions);
- to animate the seminar and to facilitate discussions in order to ensure a genuinely interactive nature of this exercise;
- to draft a post seminar report of proceedings (max. 10 pages);

- to liaise with the steering committee when coordinating with speakers the content of presentations / interventions in line with the rationale of the seminar.

For the synthesis research report, the tasks of the subcontractor are the following:

- to prepare the draft synthesis research report of 40 - 60 pages covering all 29 countries, which should make use of the findings of the literature review, survey, cases, and results of EU seminar 1. This draft report, that will serve as a discussion paper for the EU Seminar 2, should be submitted to European social partners for comment at a steering committee planned to take place 2 months prior to the EU Seminar 2;
- to compile the final synthesis research report, which should integrate the results of discussions during EU seminar 2, that will be finalised during the final steering committee meeting due to take place at the end of the study;
- to ensure that the final synthesis study reflects the outcomes of the research and discussions at both national and at EU level.

IV./ Expertise and experience required

Subcontractor

Sound experience is required in the following areas:

- Successful track record in delivering research-based projects over a long time frame (+12 months);
- Ability to formulate and carry out a tailored methodology involving a variety of actions (i.e. survey, literature review, seminars);
- Coordinating, running and animating large-scale seminars (of up to 100 participants), preferably on the issue of climate change;
- Strong project management, research and analytical skills;
- Report drafting skills (in English);
- Ability to work within specified deadlines and to respect budgetary limits.

Sound expertise is also required on the following issues:

- Expertise on the employment impact of climate change policies;
- Technical knowledge of the scientific aspects of climate change;
- Knowledge of industrial relations systems and labour market issues in the target countries and the social dialogue at EU level,
- Ability to inform and advise on strategic priorities with regard to the impact on employment / labour markets of climate change policies;
- Ability to identify and analyse issues in the social, employment and labour market fields currently faced by social partners in the 29 target countries.

V./ Time schedule and reporting

The subcontractor will be asked to work from 01/12/2009 to 31/05/2011. The subcontractor will be responsible for remitting the deliverables foreseen in the project methodology within the above time frame.

The subcontractor will be asked to work 50 days, of which:

- 8 days are dedicated to attendance of the steering meetings (4) and EU seminars (4);

- 8 days are considered necessary for the preparatory phase of the project, proposing the detailed research methodology, and compilation of the survey;
- 14 days are considered necessary for the survey analysis, initial literature review work, and case study coordination to be undertaken in advance of EU Seminar 1, as well as proposing a methodology and programme for the seminar;
- 20 days are considered necessary to complete the literature review, prepare and draft the research report (40-60 pages), coordination to be undertaken in advance of EU Seminar 2, as well as proposing a methodology and programme for the seminar.

VI./ Payment

The total maximum budget available for expertise is as follows:

Contract with BUSINESSEUROPE			Contract with ETUC		
<ul style="list-style-type: none"> ➤ Literature review and survey ➤ Steering Committee meeting # 2 ➤ EU-level seminar # 1 ➤ Steering Committee meeting # 3 ➤ Final research report 			<ul style="list-style-type: none"> ➤ Kick-off Steering meeting # 1 ➤ Literature review and survey ➤ EU-level seminar # 2 ➤ Steering Committee meeting # 4 ➤ Final research report 		
Contract with BUSINESSEUROPE			Contract with ETUC		
Daily rate	Days of work	€	Daily rate	Days of work	€
€ 550	X 24 days	13,200	€ 550	x 26 days	14,300
TOTAL € 27,500					

As mentioned in Part A, the subcontractor will have to enter in 2 contracts, one with **BUSINESSEUROPE**, and one with **ETUC**, according to the repartition of activities to be managed by each organisation as above.

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

In accordance with the above table, the subcontractor will enter into a contract with **BUSINESSEUROPE** for a total of € 13,200. The subcontractor will also enter into a contract with **ETUC** for a total of € 14,300.

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:	<u>€ 13,200.</u>
Contract with ETUC:	<u>€ 14,300.</u>
<u>TOTAL:</u>	<u>€ 27,500.</u>

VIII./ Selection criteria

The offers will be examined against the following criteria:

- Ability to formulate and carry out a tailored methodology involving a variety of actions (i.e. survey, literature review, seminars);
- Experience in coordinating, running and animating large-scale seminars (of up to 100 participants), preferably on the issue of climate change;
- 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 environmental issues, industrial relations systems, labour market issues, and social dialogue at EU level,
- Ability to identify and integrate analyses of the actual problems in the social and environmental field currently faced by employers' and trade unions' organisations in the target countries,
- Project management experience essential,
- Successful track record in delivering research-based projects over a long time frame (+12 months);,
- Ability to conduct meetings and draft all documents in English,
- Good administrative skills,
- Respect of deadlines,
- 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 BUSINESSEUROPE and ETUC websites, by 24 October 2009. Offers must be sent both to BUSINESSEUROPE and ETUC (see contact address below).

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

XI./ Annexes

- European social partners' work programme 2009-2010.
- Indicative Calendar of activities for the project 'Integrated Programme of the EU Social Dialogue 2009 – 2011' (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).