



Integrated Programme of the EU Social Dialogue 2009-2011

Tender Specifications for subcontracting external expertise

IP 2 – Joint Study

"The implementation of flexicurity and the role of social partners" - Phase 1

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* 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:

- *"jointly monitor the implementation of the common principles of flexicurity, notably to evaluate the role and involvement of the social partners in the process and to draw joint lessons."*

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 implementation of flexicurity and the role of social partners**" – **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

Change is a constant feature of modern economies and labour markets. It is now widely accepted that workers and companies both need more flexibility and security in order to successfully adapt to change. This has become known as the "flexicurity approach".

In 2007, European social partners conducted a joint analysis of the key challenges facing European labour markets. They identified flexicurity as a win-win situation, outlined a common understanding of its components, and formulated a series of recommendations to social partners themselves, member states and EU Institutions. By doing so, they effectively contributed to the formulation and subsequent adoption of a set of common principles of flexicurity by the EU Council.

The European social partners' commitment to monitor the implementation of the EU common principles of flexicurity was also welcomed by the European Commission in its Communication of 3 June 2009 on "A shared commitment for employment".

On the basis of this joint commitment and the recommendations on flexicurity expressed in the joint labour market analysis, European social partners have decided to undertake joint work together with their national affiliates on the implementation of the flexicurity principles.

Due to the financial and economic crisis, the situation on Europe's labour markets differs to 2007 when the common principles were agreed upon. Their effectiveness in addressing the crisis and preparing for recovery will be taken into account when evaluating the implementation of the flexicurity principles.

The main objective of the present proposal is to assess the role of social partners at different levels in the implementation of flexicurity. This project also aims to promote trust and mutual understanding between the social partners so as to facilitate the implementation of the flexicurity principles at national level. In undertaking this project, European social partners will build on their experience and results of an EU-wide joint study on restructuring that has been underway since 2005. The focus of this joint study has also been on the specific role and work of social partners in this context. A final overview of the common issues of concern identified by national social partners will be presented and discussed during a thematic seminar that will be held in Brussels by January 2010. European social partners will also build on the results of their joint project activities on capacity building and social dialogue undertaken between 2004 and 2009¹.

The purpose of the present call is to enable European social partners to carry out the agreed action that is due to span 18 months. 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

As established in the European social partners' joint Labour Market Analysis of 2007, European social partners called upon Member states to:

- *Design a right mix of policy measures addressing flexibility and security dimensions (labour law and contractual arrangements, effective and high quality active labour market policies, lifelong*

¹ Both of the above-mentioned projects are being undertaken with the financial support of the EU (latest phase: VS/2008/0235)

learning policies, efficient and sustainable social protection systems, social dialogue) for workers and employers in a holistic and balanced way. Flexicurity policies must be accompanied by sound macroeconomic policies, favourable business environment, adequate financial resources and the provision of good working conditions.

- *Involve social partners in the design of policy measures and develop their capacity where needed;*
- *Integrate the policy measures in their National Reform Programme; and*
- *Strengthen efforts for real and effective implementation of the various flexicurity measures at the appropriate level.*

European social partners called upon the Commission and the Council to:

- *Involve the social partners in the ongoing debate on defining flexicurity principles at European level and take into consideration their present contribution.*

European social partners also called upon their respective constituencies to:

- *Actively contribute to the design and implementation of policy measures addressing the flexibility and security dimensions.*

The core objective of the proposed action is, over 18 months, to enable European social partners to carry out an assessment in the Member States and Candidate Countries to evaluate the implementation of the flexicurity common principles, as outlined below, and taking into account the consequences of the economic and financial crisis on European labour markets.

To face the common challenges, the EU Member States have proposed the following common principles, here explained briefly:

- *Flexicurity is a means to reinforce the implementation of the Lisbon Strategy, create more and better jobs, modernize labour markets, and promote good work through new forms of flexibility and security to increase adaptability, employment and social cohesion.*
- *Flexicurity involves the deliberate combination of flexible and reliable contractual arrangements.*
- *Flexicurity approaches are not about one single labour market or working life model, nor about a single policy strategy: they should be tailored to the specific circumstances of each Member State.*
- *Flexicurity should promote more open, responsive and inclusive labour markets overcoming segmentation. It concerns both those in work and those out of work.*
- *Internal (within the enterprise) as well as external flexicurity are equally important and should be promoted. Sufficient contractual flexibility must be accompanied by secure transitions from job to job.*
- *Flexicurity should support gender equality.*
- *Flexicurity requires a climate of trust and broadly-based dialogue among all stakeholders, where all are prepared to take the responsibility for change with a view to socially balanced policies.*
- *Flexicurity requires a cost effective allocation of resources and should remain fully compatible with sound and financially sustainable public budgets.*

European social partners will carefully look at how these principles have been applied at national level, with a specific focus on the involvement and contribution of social partners at different levels, taking into account the challenges that a difficult economic context has created throughout Europe.

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.

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 preparation of this study on flexicurity would be entrusted to the expert coordinator working under the supervision of a small steering committee in accordance with the methodology described below. The expert coordinator would be asked to carry out the study and oversee a series of 'country cluster' seminars in parallel (see details below). For realisation of the study, the expert coordinator will be assisted by a team of up to four country experts. A total of 76 days' external expertise has been calculated for the expert coordinator and 183 days for the team of 4 country experts, taking into careful consideration the activities and deliverables required to complete the action. Please refer to the terms of reference outlined in the joint Call for tender for more detail.

The expert coordinator and his team will be selected on a joint basis following a coordinated call for tender by ETUC and by BUSINESSEUROPE.

A short description of the main activities, meetings and seminars is provided further below, in line with the prescribed methodology. In the framework of the present project, over 18 months, European social partners will conduct the study in three distinct phases.

1. Preparatory Survey

To be launched in early 2010, the survey will be addressed to all member organisations of European social partners in EU and Candidate countries (29). The expert coordinator will be in charge of compiling the survey in close coordination with the steering committee. It should be designed to capture the national social partners' general assessment of the implementation in their respective countries of policy measures in line with the stated objectives and to also assess the involvement of social partners in the design and implementation of policy measures.

2. National Fiches & Country Cluster Seminars

From the start of the project (December 2009), the expert coordinator together with the team of country experts and in close coordination with the steering committee should start undertaking desk research to compile national fiches for all 29 countries (between 10-20 pages, depending on country characteristics). The national fiches should also take into account the results of the joint European social partners' work on restructuring, mentioned previously. Once the results of the surveys are available, they should also be integrated into the fiches.

The national fiches should start by very briefly describing the economic and social context of the country in question. Part of the rationale of the fiches will be to provide up-to-date information and key comparative statistics and data that takes into account the impact of the current financial and economic crisis. The fiches should then follow a series of headings in line with the aforementioned mix of policy measures addressing flexibility and security dimensions for workers and employers (labour law and contractual arrangements, active labour market policies, lifelong learning policies, social protection systems, social dialogue). A range of sources can be used, drawing where possible on comparable data for each country.

A travel fund provision for up to ten 2-day trips will be available for the experts to visit certain 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). Past and present project experience indicates that such a provision for all 29 countries covered by the study would not be realistic. It is also anticipated that certain countries may have a greater wealth of material and practices to draw conclusions from.

During the final four months of 2010, once the national fiches have been compiled, it is anticipated that four 2-day 'country cluster' seminars will be held in national capitals. The venues of the seminars will be determined once the project is underway. The objectives of these seminars are threefold:

- Each seminar involving 7-8 countries will enable more focused and interactive discussions in smaller groups;
- They will provide a platform to compare experiences and share best practices;
- They will mix together countries of different sizes and with different systems of industrial relations as opposed to countries with 'similar' characteristics.

Each cluster seminar will include as background material the draft national fiches for each country concerned as well as a background paper on general trends encompassing all countries covered by the study, to be adapted as the cluster seminars progress.

3. EU Synthesis Seminar

Following the four 'country-cluster' seminars, a stock-taking EU synthesis seminar due to be held in the first half of 2011 bringing together representatives from the 29 countries covered will be organised in Brussels. Social partner representatives from the EEA countries will be also invited to take part in the seminar at their own cost. The aim of this conference will be to present a synthesis report bringing together the findings of the surveys, national fiches, and country-cluster seminars. It will be organised by BUSINESSEUROPE on behalf of all social partner organisations.

E./ Activities

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

1. Kick-off Steering Committee Meeting (organised by ETUC)

- 13 participants
 - 8 EU secretariats
 - 1 expert coordinator
 - 4 country experts
- Venue: Brussels
- Date: approx. December 2009
- Duration of meeting: 1 day
- Interpretation: None

2. Three further 1-day steering committee meetings are foreseen in Brussels, following a similar format but without the attendance of the 4 country experts:

- one meeting after the survey and before the country cluster seminars (organised by ETUC)

- one meeting before the synthesis seminar (organised by BUSINESSEUROPE)
- one concluding meeting (organised by BUSINESSEUROPE)

3. The expert coordinator and the four country experts will meet in 1-day experts' coordination meetings. Three of such meetings are foreseen:

- one preparatory meeting (organised by ETUC)
- one meeting during the Country Cluster Seminar phase of the project (organised by ETUC)
- one concluding meeting (organised by BUSINESSEUROPE)

The four country experts will prepare the 29 country fiches on the basis of the expert coordinator's methodology with a view to meeting the project's objectives.

A travel fund provision for up to ten 2-day trips will be available for the experts to visit certain 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).

4. The 29 fiches (one per country) will be presented and discussed during 4 country-cluster seminars, (1 and 3 organised by ETUC, 2 and 4 by BUSINESSEUROPE) in each case:

- 53 participants from EU 27, Turkey, Croatia (and EEA countries*)
 - 40 national social partners (20 trade unions, 20 employers)
 - 8 EU secretariat
 - 1 expert coordinator
 - 4 country experts
- Venue: National capitals (TBC)
- Dates: Between September – December 2010
- Duration of seminar: 2 days
- Languages: 6/7 languages

The fiches will then be finalised by the country expert responsible 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.

Each cluster seminar will include as background material the draft national fiches for each country concerned as well as a background paper on general trends encompassing all countries covered by the study, to be adapted as the cluster seminars progress.

5. The results of these 29 fiches together with the overall comparative results of the 29 countries involved will then be presented at a EU synthesis seminar (organised by BUSINESSEUROPE) involving social partners from all EU member states:

- 140 participants from EU 27, Turkey, Croatia (and EEA countries*)
 - 120 national social partners (60 trade unions, 60 employers)
 - 8 EU secretariat
 - 1 expert coordinator
 - 4 country experts
 - 7 guest speakers
- Venue: Brussels
- Dates: April / May 2011 (TBD)

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

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

- Duration of conference: 2 days
- Interpretation: 8 languages

A final report will be prepared by the expert coordinator in close coordination with the steering committee taking into account the results of the synthesis seminar.

Provisional Calendar of activities IP2 - Flexicurity	
2009	
1 September	• Launch of Call for Tender
November	• Selection Committee for choice of subcontracted expert coordinator
December	• Kick off Steering Committee Meeting # 1 with expert coordinator (ETUC)
2010	
January	• Drafting of Survey by subcontracted expert coordinator (EN/FR)
Jan / Feb	• Launch Survey to affiliates of European social partner organisations
Jan / Feb	• Experts Coordination Meeting # 1 (ETUC)
March / April	• Deadline for Survey responses
June	• Deadline for submission of draft national fiches by country experts
June	• Steering Committee meeting # 2 with expert coordinator (ETUC)
September	• 1 st Country Cluster Seminar (ETUC)
October	• 2 nd country Cluster Seminar (BUSINESSEUROPE)
Sept – Dec	• Experts Coordination Meeting # 2 (ETUC)
November	• 3 rd Country Cluster Seminar (ETUC)
December	• 4 th Country Cluster Seminar (BUSINESSEUROPE)
2011	
February	• Steering Committee Meeting # 3 (BUSINESSEUROPE)
March	• Experts Coordination Meeting # 3 (BUSINESSEUROPE)
April / May	• EU Synthesis Seminar (BUSINESSEUROPE)
April / May	• Steering Committee Meeting # 4 (BUSINESSEUROPE)
May	• Study Research Report finalisation

F./ Organisation

For the implementation of this study, an expert coordinator will be contracted for 76 days' expertise (see under section V for a detailed breakdown). To support the expert coordinator, a team of 4 'Country Experts' should be identified by the subcontractor. 183 days' expertise has been calculated for the work of the country experts.

The expert coordinator is responsible for coordination, supervision, methodology for the work and the animation of the 4 country cluster seminars and the EU seminar.

The expert coordinator is also responsible for research, analysis and compiling a study for this activity. The final document should be between 40 and 60 pages, and should be submitted to European social partners for approval in advance of the EU seminar described above. The expert coordinator will also supervise the work of the 4 country experts, notably with regard to the compilation of the 29 national fiches.

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 BUSINESSEUROPE and ETUC.

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

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 implementation of flexicurity and the role of social partners" – 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. 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

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

Description of tasks to be performed by the subcontractor

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 European social partners' study on restructuring that will have been conducted in EU countries (2004-9), to carry out the study on flexicurity in 29 countries and to ensure that the final synthesis research report reflects the outcomes of the research and discussions at both national and at EU level;
- to provide expertise, with the help of the selected country experts, on the issues dealt with (managing change, restructuring, social dialogue and industrial relations in the 29 countries);
- to select, with the approval of the steering committee, a team of 4 Country Experts, who will be responsible on a country basis to be allocated evenly for compiling the national fiches;
- 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 synthesis research report, which highlights characteristics and issues shared by all the 29 countries;

- to assist project administrators in BUSINESSEUROPE and ETUC in organising the country cluster and EU seminars bringing together the European social partners and representatives of the national social partners in the 29 target countries;
- to assist project administrators in BUSINESSEUROPE and ETUC in organising the other steering committee meetings;
- to organise 3 experts' coordination meetings with country experts.

The subcontractor will be responsible, with the approval of the steering committee, for appointing 4 country experts to compile the national fiches for the 29 countries covered in this project and present their research findings in 4 country cluster seminars.

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

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

- to present a preliminary draft of the survey to be discussed during the kick-off steering committee meeting;
- 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 trends to be included in the national fiches / background papers for the country cluster seminars.

For the **national fiches**, 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 national fiches, involving the relevant national social partners, building on the content of the country dossiers that have been developed during the joint study on restructuring in the EU (2005-9);
- to organise two experts' coordination meetings. One should be conducted before the national fiches are compiled to brief the country experts on the format and methodology to follow. A further meeting should be conducted at an interim stage to discuss, evaluate and adapt as necessary the methodology and procedures in place once the country cluster seminars are underway.

The tasks to be performed by the **country experts** are the following:

- to draft the national fiches (10 – 20 pages) following the defined methodology, involving if and as necessary the relevant national social partners (employers and trade unions) while respecting bipartism in the process. The fiches should start by very briefly describing the economic and social context of the country in question, providing up-to-date information and key comparative data. The fiches should then follow a series of headings in line with the aforementioned mix of policy measures addressing flexibility and security dimensions (see section I.D.2). The fiches should also draw on the content of the country dossiers that have been developed during the joint study on restructuring in the EU (2005-9);
- 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 as and if necessary up to ten 2-day country visits of to collect data and conduct interviews with national social partners.

For the **country cluster seminars**,

The tasks of the **subcontractor** are the following:

- Preparation of the seminars in accordance with the methodologies defined (including drafting of background papers, presentation materials etc.);
- Propose a mix of countries for each of the 4 seminars with 'different' as opposed to 'similar' characteristics (size, geographic location, system of industrial relations etc.);
- Animation of the seminars;
- Drafting of a report on proceedings (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 background papers for the seminars, when moderating the seminar and drafting the report;
- Integration of the results of the discussions in the national fiches, to be undertaken with the assistance of the country experts;
- Assistance with the practical organisation of the seminars.

The tasks of the **country experts** are the following:

- to present and discuss the national fiches;
- to assist the expert coordinator in running / chairing working sessions;
- Provision of expertise. Expertise is essential on the different national industrial relations systems, as well as on social dialogue at EU level;
- to finalise, under the supervision of the expert coordinator, the national fiches integrating comments made by the national social partners during the seminar.

For the **synthesis research report**,

The tasks of the **subcontractor** are the following:

- to draft the draft synthesis research report (40 – 60 pages) and integrate the results of the preparatory survey, trends emerging from the national fiches, results of discussions during the EU seminar, and building on the previous study on restructuring in the EU (2005-9);
- to present, during the steering committee meeting to be held in advance of the EU seminar, a consolidated draft of the report in line with the methodology defined;
- to finalise the report following the final steering committee meeting to be held after the EU seminar.

For the **EU synthesis seminar**,

The tasks of the **subcontractor** are the following:

- Organise a third and final experts' coordination meeting in advance of the EU seminar to discuss the draft synthesis research report, as well discussion materials and presentations to be made by the subcontractor and country experts during the EU seminar;
- Coordinate with BUSINESSEUROPE and ETUC on the organisation of the EU seminar and the preparation of documents for national social partner representatives who will participate;

- 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 research report.

The tasks of the **country experts** are the following:

- to attend the aforementioned third and final experts' coordination meeting in advance of the EU seminar;
- to assist the expert coordinator in preparing seminar materials to be presented (discussion documents, presentations);
- to assist the expert coordinator in animating working sessions of the seminar.

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 seminars, in line with the methodologies that were developed during the past Integrated Programmes undertaken by European social partners;
- Running and animating large-scale seminars on the issues of managing change, industrial relations and social dialogue;
- Coordination and running of large-scale events involving external speakers and 100+ participants from EU 27 and candidate countries on the above themes;
- Successful track record of delivering in similar projects run over a 12+ month period.

Sound expertise is required on the following issues:

- Sound understanding of the methodology implemented in recent projects undertaken by European social partners, notably the joint study on restructuring (2005-9);
- Expert knowledge of social dialogue characteristics and industrial relations systems in the target countries and at EU-level;
- Ability to identify and integrate analyses of current labour market trends faced by employers' and trade unions' organisations in the target countries;
- Ability to identify and manage 4 country experts with appropriate experience and expertise (as defined below);
- Project management;
- Report drafting skills (in English);
- Ability to work within specified deadlines and to respect budgetary limits.

Country experts

Sound experience is required in the following areas:

- Ability to implement the above-mentioned methodologies for the national fiches and seminars;
- Evidence of experience in managing and conducting wide-ranging studies;
- Successful track record of delivering in similar projects run over a 12+ month period;
- Report drafting skills (in English);
- Ability to work within specified deadlines and to respect budgetary limits.

Sound expertise is required on the following issues:

- Good knowledge of social dialogue characteristics and industrial relations systems in the target countries and at EU-level;
- Research and presentation skills.

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 76 days, of which:

- 17 days are dedicated to attendance of the steering meetings (4), expert coordination meetings (3), country cluster seminars (8) and the EU seminar (2);
- 10 days are considered necessary for the preparatory phase of the study (preparation of first 2 steering committee meeting, compilation of survey and analysis of responses, proposed methodology for the 4 country cluster seminars);
- 24 days (4 x 6 days) are considered necessary for preparing the 4 country cluster seminars (review of the national fiches, compiling and updating the background papers, preparing presentations and assistance in organising and coordinating the seminars);
- 9 days (3 x 3 days) are considered necessary to prepare the 3 expert coordination meetings (briefing the country experts on the methodology, tasks and activities, preparing templates for the national fiches, allocating work to be undertaken to prepare for all the seminars and to compile the final synthesis research report);
- 6 days are considered necessary for the preparation of the 2 remaining steering committee meetings (proposed methodology for the EU seminar, finalisation of the synthesis research report);
- 10 days are considered necessary to prepare materials for the EU seminar and to draft the synthesis research report to be presented and discussed at the seminar.

The country experts will be asked to work 183 days, of which:

- 52 days are dedicated to attendance of seminars and meetings (32 days for country cluster seminars (4 seminars x 4 experts x 2 days), 12 days for expert coordination meetings (3 meetings x 4 experts), and 8 days for the EU seminar (4 experts x 2 days)).
- 87 days (29 x 3 days) are considered necessary to compile the national fiches that will be presented and discussed during the 4 country cluster seminars;
- 16 days (4 experts x 4 seminars x 1 day) are considered necessary to prepare for the 4 country cluster seminars (preparation of presentation materials and for participation in the seminar working sessions);
- 12 days (4 experts x 3 meetings x 1 day) are considered necessary to prepare for the 3 expert coordination meeting to be held (proposals and follow up to prepare the national fiches and preparation of discussion on the format / working sessions of the EU seminar);
- 16 days (4 experts x 4 days) to finalise national fiches, prepare presentation materials and working sessions for the EU seminar.

VI./ Payment

The total maximum budget available for expertise is as follows:

Contract with BUSINESSEUROPE			Contract with ETUC		
Activities and Meetings					
<ul style="list-style-type: none"> ➤ Preparatory Survey ➤ National Fiches x 15 ➤ Country Cluster Seminar # 2 ➤ Country Cluster Seminar # 4 ➤ Steering Committee Meeting # 3 ➤ Experts' Coordination Meetings # 3 ➤ EU Synthesis Seminar ➤ Final Study Research Report ➤ Steering Committee Meeting # 4 			<ul style="list-style-type: none"> ➤ Steering Committee Meeting # 1 ➤ Preparatory Survey ➤ Experts' Coordination Meeting # 1 ➤ National Fiches x 14 ➤ Steering Committee Meeting # 2 ➤ Country Cluster Seminar # 1 ➤ Experts' Coordination Meeting # 2 ➤ Country Cluster Seminar # 3 ➤ Final Study Research Report 		
Expertise		€	Expertise		€
Expert Coordinator	550€ x 42 days	23,100	Expert Coordinator	550€ x 34 days	18,700
Country Experts	350€ x 101 days	35,350	Country Experts	350€ x 82 days	28,700
TOTAL BUSINESSEUROPE		58,450	TOTAL ETUC		47,400

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 € 58,450. The subcontractor will also enter into a contract with ETUC for a total of € 47,400.

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>€ 58,450.</u>
Contract with ETUC:	<u>€ 47,400.</u>
<u>TOTAL:</u>	<u>€ 105,850.</u>

VIII./ Selection criteria

Subcontractor

The offers will be examined against the following criteria:

- Ability to propose a tailored methodology to have genuinely interactive seminars, building on recent projects undertaken by European social partners in the 29 target countries;
- Evidence of extensive experience in running and animating large-scale interactive seminars on the themes of social dialogue and managing 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 social dialogue characteristics and industrial relations systems in the target countries and at EU-level;
- Ability to identify and integrate analyses of current labour market trends faced by employers' and trade unions' organisations in the target countries;
- Project management experience essential;
- Ability to identify and manage 4 country experts with appropriate experience and expertise;
- Successful track record of similar project management experience is essential, involving +12-month duration;
- Ability to conduct meetings and draft all documents in English;
- Good administration 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 '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).