



Integrated Programme of the EU Social Dialogue 2009-2011

Tender Specifications for subcontracting external expertise

IP 3 – Resource Centre "EU Social Dialogue Seminar"

Date of publication on the BUSINESSEUROPE website:	9 September 2009
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:

- *"continue their work on capacity building in an enlarged EU, in the EEA and in candidate countries including further developing the activities of the social partners' respective resource centres"*

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 project entitled "**EU Social Dialogue seminar**", 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

European social partners wish to continue to build on the outcomes of the previous joint projects on capacity building for an effective bipartite social dialogue. It will enable them to discuss and review the main challenges that national social partners still face for an effective involvement in the EU Social Dialogue, including the extent to which EU social dialogue agreements have been given a follow-up at national level. They can thus pursue transnational exchanges of the impact of the EU social dialogue issues and instruments at national level. An innovative element of this action will be to focus specifically on the implementation of some of the most recent achievements of the autonomous EU social dialogue, such as the framework agreements on telework (2002) and / or stress at work (2004).

They therefore intend, in early 2011 and approximately 18 months after the closing conference of the project "What are social partners' needs?" held in June 2009, to organise a large-scale seminar on the EU Social Dialogue bringing together social partners from all EU member states and Croatia and Turkey. Given the current economic and financial crisis, it is also highly important that social dialogue processes and mechanisms in all countries concerned continue to function effectively to mitigate the negative social consequences of the crisis. This seminar will also provide the opportunity for dialogue on how social partnership is instrumental in different contexts to this end.

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

The main objective of this 2-day Brussels-based seminar will be to provide a one-off opportunity for up to 100 social partner representatives from EU Member States and candidate countries Croatia and Turkey to discuss and review the main challenges that national social partners still face for an effective involvement in the EU Social Dialogue. Past experience has shown that such large-scale stock-taking events have a real added value for social partners from all countries, where they are able to exchange experiences and benefit from peer learning. The event will also use as a basis to present the results of a joint survey to be conducted by an external expert coordinator (see below for more details).

This EU Social Dialogue seminar will be organised and coordinated by ETUC on behalf of the EU social partners.

D./ Method

ETUC will manage the project on behalf of all European social partners.

To help to carry out the proposed action, an expert coordinator will be subcontracted and will be selected on a joint basis. The expert coordinator, in constant liaison with the European social partners, will work under the 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).

Working under the supervision of a small steering committee composed of European Social Partners, the appointed expert will be in charge of compiling a survey in close coordination with the steering committee. The survey, which should be designed to capture European social partners' affiliates' views on the perceived impact of the implementation of EU social dialogue tools and agreements in their national context, will then be launched in EU countries.

The expert will then draft a background paper (up to 40 pages) analysing and summarising the main trends emerging from the survey that will be presented and discussed at the seminar, and taking into account the results of the previous joint project 'What are the social partners' needs 2004 - 2009.

In addition to the EU Social Dialogue seminar, two steering committee meetings are planned to pilot the two phases of the action, the first to discuss and finalise the survey and the second in advance of the EU seminar.

A total of 24 days' external expertise has been calculated taking into careful consideration the activities and deliverables required to complete the action. The expert coordinator will be responsible for compiling the survey, for analysing its results, for drafting the background document of the EU seminar, for animating the seminar and over the course of the action for coordination and liaison with the steering committee.

A short description of the main activities, meetings and seminars is provided further below, in line with the prescribed methodology.

1. Preparatory Survey

To be launched in mid 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 some of the most recent achievements of the autonomous EU social dialogue, such as the framework agreements on telework (2002) and stress at work (2004).

2. EU Social Dialogue Seminar

The EU seminar is due to be held at the beginning 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 seminar will be to present a synthesis report bringing together the findings of the surveys and building on the results of the previous joint project 'What are the social partners' needs 2004 - 2009. It will be organised by ETUC on behalf of all social partner organisations.

E./ Activities

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

Two 1-day steering committee meetings will be held in Brussels, the first to discuss and finalise the survey and the second in advance of the EU seminar to discuss the draft background paper (both meetings organised by ETUC):

- 9 participants
 - 8 EU secretariats
 - 1 expert coordinator
 - Dates: Early 2010 for the first meeting and by the end of 2010 for the second meeting
 - Language: English

2-day Brussels-based EU Social Dialogue Seminar (organised by ETUC)

- 100 participants
 - 88 national social partners (44 trade unions, 44 employers)
 - 8 EU secretariats
 - 1 expert coordinator
 - 3 invited speakers
- Dates: Early 2011 (to be specified)
- Interpretation: 6 languages

Provisional Calendar of activities IP3 – EU Social Dialogue Seminar	
2009	
1 September	• Launch of Call for Tender
November	• Selection Committee for choice of subcontracted expert coordinator
2010	
February	• Kick off Steering Committee Meeting # 1 with expert (ETUC)
January	• Drafting of Survey by subcontracted expert coordinator (EN/FR)
April/August	• Launch Survey to affiliates of European social partner organisations
September	• Deadline for Survey responses
November	• Steering Committee Meeting # 2 with expert coordinator (ETUC)
December	• Deadline for submission of draft national report by expert coordinator
2011	
January/February	• EU Social Dialogue Seminar (ETUC)
March	• Deadline for submission of final national report by expert coordinator
May	• Study Research Report finalisation

F./ Organisation

For the implementation of this study, an expert coordinator will be contracted for 24 days' expertise (see under section V for a detailed breakdown).

The expert coordinator is responsible for coordination, supervision, methodology for the work and the animation of the EU Social Dialogue seminar.

The expert coordinator is also responsible for research, analysis and compiling a study for this activity. The final document should be up to 40 pages, and should be submitted to European social partners for approval in advance of the EU seminar described above.

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 ETUC in close coordination with BUSINESSEUROPE.

In addition, all four organisations in the project partnership (BUSINESSEUROPE, ETUC, UEAPME and CEEP) will provide expertise for the research component, seminar and the steering group meetings in Brussels. At the national level affiliates of the four European social partner organisations will participate in both the preparatory survey phase and the EU seminar.

II./ Purpose of the tender

The tender aims at finding a subcontractor to carry out the joint study of the European Social Partner Organisations "**EU Social Dialogue seminar**".

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" 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 propose a methodology to carry out the survey in the 29 countries on the implementation of some of the most recent achievements of the autonomous EU social dialogue, such as the framework agreements on telework (2002) and / or stress at work (2004),
- to animate the EU seminar and to facilitate discussions 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 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 meetings and the EU seminar.

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 first 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 conclusions to be included in the synthesis report.

For the **EU Social Dialogue seminar**, the tasks of the **subcontractor** are the following:

- Following the second steering committee meeting, to coordinate with BUSINESSEUROPE and ETUC on the organisation of the EU seminar and the preparation of documents (including drafting of agenda, background papers, presentation materials etc.);
- 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;
- Preparation of a draft synthesis report of max. 40 pages, which should make use of the findings of the survey and serve as a discussion paper for the EU Seminar,
- To present and discuss the result of the survey;
- To animate the seminar;
- Drafting of a report on proceedings (max. 10 pages);
- 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 synthesis report;

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

- to draft the draft synthesis research report (up to 40 pages) and integrate the results of the preparatory survey, results of discussions during the EU seminar;
- 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 EU 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 national seminars,
- Running and animating national seminars on the theme of EU social dialogue,
- Coordination and running of large-scale events involving external speakers and 100+ participants from EU 29 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:

- Expert knowledge of industrial relations systems in the target countries and the social dialogue at EU level,
- Ability to identify and integrate analyses of current labour market issues faced by employers' and trade unions' organisations in the target countries,
- Understanding of the methodology implemented in recent projects undertaken by European social partners on EU Social Dialogue,
- Project management,
- Sound research and presentation skills,
- Report drafting skills (in English);
- Ability to work within specified deadlines and to respect budgetary limits.

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 24 days, of which:

- 4 days are dedicated to attendance of the steering meetings and the EU seminar;
- 6 days are considered necessary for the preparatory phase of the study (preparation of first steering committee meeting, compilation of survey and analysis of responses)
- 6 days are considered necessary for the preparation of the second steering committee meetings (proposed methodology for the EU seminar, finalisation of the synthesis research report);
- 6 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.
- 2 days are considered necessary for finalising the synthesis report following the EU seminar.

VI./ Payment

The total maximum budget available for expertise is as follows:

Contract with ETUC	
Activities and Meetings	
<ul style="list-style-type: none"> ➤ Steering Committee Meeting # 1 ➤ Preparatory Survey ➤ Steering Committee Meeting # 2 ➤ EU Seminar ➤ Final Study Research Report 	
Expertise	€
Expert 550€ x 24 days	13,200 €

The subcontractor will have to enter in one contract with ETUC who will be managing this project on behalf of the EU Social Partner organisations as above.

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

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

VII./ Price

TOTAL: **€ 13,200.**

VIII./ Selection criteria

Subcontractor

The offers will be examined against the following criteria:

- Ability to propose a tailored methodology to have a survey as well as genuinely interactive EU seminar, preferably in line with the methodologies that were developed during the recent projects undertaken by European social partners,
- Evidence of extensive experience in running and animating interactive EU seminars on the theme of EU social dialogue,
- 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 current labour market issues faced by employers' and trade unions' organisations in the target countries,
- Project management experience essential,
- 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 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).