



Tender Specifications for subcontracting external expertise¹

JOINT EU EMPLOYERS' PROJECT ON ACTIVE AGEING

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¹ Under reserve of acceptance of the project by the European Commission

1 BACKGROUND

1.1 Introduction

The European employers' social partners BUSINESSEUROPE, CEEP and UEAPME have undertaken to develop a joint project on age management policies and look at examples of good practices at enterprise level.

They 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 their action, with a final decision expected in November 2011.

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 12-month joint project entitled "***Age management policies in enterprises in Europe***".

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

1.2 Project Description

Demographic ageing will increasingly have economic and social effects in European countries. It will impact not only on the long term sustainability and adequacy of pension and health care systems, but also on labour markets and enterprises.

The working age population in the European Union is set to decrease by 50 million by 2060, while at the same time the elderly population (aged 65 years or over) is expected to increase by 67 million. This structural shift is mainly the consequence of a higher life expectancy for both men and women and of a decrease in fertility and mortality rates..

For Europe to remain competitive in a global economy and foster growth, it is necessary to improve the participation of all age groups into the European labour markets and to reach the EU 2020 target of 75% employment rate for women and men aged 20-64, of which the greater participation of older workers is an important aspect.

2012 will be the "European Year for Active Ageing and Solidarity between Generations", therefore putting the spotlight on initiatives to be organised at local, regional, national and European levels, and bringing together stakeholders from governments, regional and local authorities, social partners and NGOs.

Social partners and specifically employer organisations have an important role to play and intend to actively participate in the debate.

Accordingly, the European employers' social partners BUSINESSEUROPE, CEEP and UEAPME have undertaken to develop a better understanding of age management policies put in place by private and public services' enterprises of all sizes and sectors across the European Union. They will identify examples of what enterprises doing on the issue or foresee to do in the short and medium term.

1.3 Objective

The overarching objective is to obtain a greater understanding and knowledge of how employers can encourage and facilitate the continued participation of older workers and ensuring flexible retirement processes in order to meet the challenges of ageing societies.

A large part of the rationale of this proposal is to capture examples of good practices from private and public services' enterprises of all sizes in different sectors and/or across the European Union. It could also approach the issue across different industries and sectors.

It is anticipated that in terms of outcomes, a final synthesis can be used and disseminated on age management by enterprises as well as on the framework contributing to efficient age management policies. It is also important to keep in mind the importance of the cross-industry social dialogue and that active ageing could be discussed within the framework of the European social partners work programme in the future.

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

- Map best practices from private and public services' enterprises in the field of active ageing across all the 27 EU Member States;
- Identify positive and negative framework conditions impacting on age management policies at Member States level;
- Draw recommendations on the best way to address the issue of active ageing at European level;
- Identify and discuss future actions and / or ways in which employers can work, separately or jointly with other European social partners, namely the European Trade Union Confederation, to better address demographic ageing and its impact on employment.

1.4 Method

1. First phase: background research and paper

The first stage of the project will be to start mapping out examples of best practices at enterprise level in all 27 Member States. This will include desk research and interviews to be conducted with enterprises.

A fund will be available to allow the subcontracted expert to meet with private and public enterprises of all sizes, in close coordination with the steering committee members who will decide together what examples of good practices should be explored further and promoted at European level.

The experts will assess the extent to which national policy frameworks have a positive or negative impact on age management policies in companies. He/she will establish a description of some national situations.

The subcontracted expert, in close coordination with the steering committee, will prepare a first overview of the situation in European countries and select ten (10) examples of best practices. It will be turned into a background paper to be used and discussed during the EU-level conference to be held in Brussels.

2. Second phase: an EU-level conference

One EU-level conference, bringing together 100 participants including national employers' social partner representatives, enterprise representatives from the 27 Member States together with guest experts, the European Commission and representatives of the European Trade Union Confederation. A selection of concrete case studies will be presented at the conference in order to compare and discuss the different employers' initiatives on active ageing.

It is anticipated that the conference will be held in Brussels in September/October 2012. This conference will be organised and coordinated by BUSINESSEUROPE on behalf of the European employers' social partners.

3. Third phase: synthesis

The subcontracted expert will prepare a synthesis based on the outcomes of the EU-level conference and from the overall findings for the project. The final synthesis document will be discussed on the occasion of a final steering committee meeting, to take place no later than one month before the end date of the project, and will be actively disseminated and promoted.

1.5 Activities

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

One-day Brussels-based kick-off steering committee meeting

7 participants: 6 EU secretariats, 1 expert

Date: December 2011

Two further one-day steering committee meetings are foreseen in Brussels with the same format:

One meeting before the EU-level conference

One concluding meeting

Travel Fund

A travel fund for up to ten 2-day trips will be available for the subcontracted expert to visit a number of enterprises in EU countries as required to consolidate research results and organise face-to-face meetings.

Two-day Brussels-based EU-level conference

+/- 100 participants from EU 27

12 case study presenters (2 per Member States selected)

60 national employers' social partners

10 EU secretariats

1 expert

4 guest speakers

Date: September/October 2012

Languages: 3 languages will be available for interpretation (EN, FR, DE)

Provisional Calendar of activities	
2011	
September	<ul style="list-style-type: none"> • Launch of Call for Tender
October	<ul style="list-style-type: none"> • Selection Committee choice of subcontracted expert
December	<ul style="list-style-type: none"> • Kick-off Steering Committee Meeting #1 with subcontracted expert • Methodology finalisation
2012	
January	<ul style="list-style-type: none"> • Drafting of a background paper by subcontracted expert
Jan / March	<ul style="list-style-type: none"> • Launch of preparatory phase • Visits of private and public enterprises
April / May	<ul style="list-style-type: none"> • Intermediate Steering Committee meeting #2 with subcontracted expert • Background paper finalisation, panels and speakers decisions
September / October	<ul style="list-style-type: none"> • EU-level Conference in Brussels
October / November	<ul style="list-style-type: none"> • Steering Committee meeting #3 with subcontracted expert • Finalisation of synthesis document / guidelines

1.6 Organisation

For the implementation of this project, an expert will be contracted for an estimated 35 days' expertise:

- He/she is responsible for the methodology and research components of the background paper and the general coordination and animation of the EU-level conference.
- He/she is also responsible for the final synthesis of the project to be produced as the main deliverable resulting from the preparatory phase and EU-level conference. The final synthesis research report should be +/- 40 pages, and should be submitted to European employers' social partners for approval prior to the conclusion of the overall project.
- In constant liaison with the European employers' social partners, he/she will work under the control and supervision of a steering committee comprising representatives of BUSINESSEUROPE, CEEP and UEAPME's offices in Brussels.

Please refer to the subcontractor terms of reference (Section 2 onwards) for a more detailed description of the experts' tasks and deliverables.

1.7 Description of project partnership

This activity will be jointly managed by BUSINESSEUROPE, CEEP and UEAPME (the partners). The partners will therefore each identify a project administrator and support staff to carry out the activity within their respective organisations. The project accounting and production of the final report for the European Commission will be carried out by BUSINESSEUROPE.

In addition, the partners will provide expertise for the project components, the EU-level conference and the steering committee meetings in Brussels.

2 PURPOSE OF THE TENDER

The tender aims at finding a subcontractor to carry out the joint project of the European employers' social partner organisations entitled "**Age management policies in enterprises in Europe**".

In order to ensure a large visibility for this tender, the partners will publish the tender specifications on their respective websites; they will each keep the tender online for 35 days on their respective websites.

3 TASKS TO BE PERFORMED BY THE SUBCONTRACTOR

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

For the background research and paper, the tasks to be performed by the subcontractor are the following:

- General research and desk research of enterprises initiatives in the field of active ageing and age management policies, including ongoing and past projects carried out by the partners' affiliates (if any);
- Collect examples of best practices and identify the situation of policy frameworks in different countries;
- The background research should be regarded as 'ongoing' so that preliminary elements in the form of a background paper can be presented during the second steering committee meeting and in preparation of the EU-level conference in September/October 2012;
- The subcontractor will have at his/her disposal the possibility to undertake up to ten (10) two-day funded visits to certain countries to organise face-to-face meetings with enterprises to complement desk research, if and as required;
- A bibliography of literature and technical documents used and reviewed should be appended to the final background paper.

For the kick-off steering committee meeting (December 2011), the tasks to be performed by the subcontractor are the following:

- to coordinate with partners on the agenda and the organisation of the meeting;
- to propose a detailed methodology for the preparatory phase coherent with the aims set in the project description;
- to present a preliminary draft of the scope of the background paper.

For the preparatory phase, 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 background paper (+/- 40 pages) with a detailed table of content to the steering committee;
- to conduct the interviews with enterprises, the analysis of the responses and present the main conclusions to be included in the background paper for the EU-level conference;
- to identify and propose what face-to-face interviews could to be conducted and organise travels accordingly with the agreement of all partners.

For the mid-term steering committee meeting, the tasks to be performed by the subcontractor are the following:

- to coordinate with partners on the agenda and the organisation of the meeting;
- to present a draft final background document, as a result of interview and face-to-face meetings, in advance of the EU-level conference;

- to advise on the choice of guest speakers to be invited, case studies to present and draft agenda to send out;
- to assist project administrators of the partners to plan the EU-level conference and follow-up activities (coordination of dates, logistics, participants, materials etc.).

For the EU-level conference (September/October 2012), the tasks to be performed by the subcontractor are the following:

- to assist the steering committee in coordination with the partners' affiliates to identify and collect 10 concrete case studies of enterprises and sectoral cases to be presented during the conference, including short presentations of the case studies;
- to apply wherever possible a balanced approach when identifying and proposing cases to capture a categorical approach: multinationals, small and medium-size companies, private and public services enterprises, sectors;
- to provide expertise on the issues dealt with during the conference (e.g. demographic trends, pension reforms, age management policies, human resource, social dialogue, skills). Special attention should be given to analysing the problems faced and solutions sought by employers social partners when assessing and addressing the main issues of age management policies in national contexts and at European level;
- to assist project administrators of BUSINESSEUROPE in organising the conference and to assist project administrators of all partners in identifying guest speakers / case study presenters;
- to propose a methodology (including the drafting of the background paper as a basis for discussion, a draft agenda; and topics to be dealt in the conference and sessions);
- to animate the conference and to facilitate/moderate discussions in order to ensure an interactive nature of this exercise, including receiving questions from the audience;
- to draft a post conference 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 conference.

For the final synthesis, the tasks of the subcontractor are the following:

- to prepare the draft synthesis (+/- 40 pages), which should make use of the findings of the preparatory phase, cases, and results of the discussions during the EU-level conference;
- the synthesis will be finalised during the final steering committee meeting due to take place at the end of the project;
- to ensure that the final synthesis reflects the outcomes of the desk research, interviews conducted and discussions at both national and at EU level;
- to ensure that the final synthesis can be used as to be disseminated widely, providing technical and practical approach, to be user friendly and in line with the overall objective of the project.

4 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. interviews, questionnaire, desk research, survey, literature review, European events, conferences, seminars);

- Coordinating, running and animating large-scale international events (of up to 100 participants), preferably on the issue of active ageing;
- 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 age management policies;
- Technical knowledge of the scientific aspects of age management;
- Knowledge of social dialogue 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 of active ageing policies;
- Ability to identify and analyse issues in the social, employment and labour market fields currently faced by employers social partners in Europe.

5 TIME SCHEDULE AND REPORTING

The subcontractor will be asked to work from 01/12/2011 to 30/11/2012.

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 35 days, of which:

- 5 days are dedicated to attendance of the steering meetings (3) and EU-level conference (2);
- 18 days are considered necessary for the preparatory phase of the project, including proposing the methodology, initial desk research, conducting interview and face-to face meetings with enterprises, drafting of a background paper (+/- 40 pages) to be used during the EU-level conference;
- 12 days are considered necessary for proposing a methodology and programme for the conference, selecting case studies, finalising the background paper, preparing and drafting the final synthesis (+/- 40 pages).

6 PAYMENT

The total maximum budget available for expertise is as follows:

Contract with BUSINESSEUROPE		
<ul style="list-style-type: none">➤ Steering Committee meeting # 1➤ Preparatory phase, background research and desk research➤ Interviews and survey➤ Steering Committee meeting # 2➤ Background paper➤ EU-level conference➤ Steering Committee meeting # 3➤ Final synthesis		
Daily rate	Days of work	€
€ 550	x 35 days	19,250
TOTAL € 19,250		

In accordance with the above table, the subcontractor will enter into a contract with **BUSINESSEUROPE** for a total of € 19,250 (all taxes included).

The subcontractor will receive an advance, interim and final payment.

7 PRICE

Contract with **BUSINESSEUROPE:** € 19,250.

TOTAL: € 19,250.

8 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;
- Experience in coordinating, running and animating large-scale international events, preferably on the issue of active ageing;
- 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 active ageing and age management issues, labour market issues, and social dialogue at EU level;
- Ability to identify and integrate analyses of the actual problems in the social and economic field currently faced by employers' organisations in Europe;
- 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.

9 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.

10 CONTENT AND SELECTION OF THE BIDS

Offers must be received within 30 days of the date of publication of this call for tender on the partners, by 30 September 2011. Offers must be to BUSINESSEUROPE (see contact address below).

To ensure confidentiality, **bidders must submit their offer in a sealed envelope 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 three representatives of the European employers' social partners (BUSINESSEUROPE, CEEP and UEAPME). 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:

BUSINESSEUROPE
Steven D’Haeseleer
Director
Social Affairs Department
Avenue de Cortenbergh 168
B – 1000 Brussels
BELGIUM

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

11 ANNEXES

- Detailed project description



ANNEX

JOINT EU EMPLOYERS PROJECT:

“Age management policies in enterprises in Europe”

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A. Introduction

European countries face a mounting pressure as a result of demographic aging. This will affect not only the long term sustainability and adequacy of pension and health care systems, but also labour markets and enterprises, which are already faced with a shortage of skilled labour.

The working age population in the EU is set to decrease by 50 million by 2060, while at the same time the elderly population (aged 65 years or over) is expected to increase by 67 million. This structural shift is mainly the consequence of a higher life expectancy for both men and women and of a decrease in fertility and mortality rates.

For Europe to remain competitive in a global economy and foster growth, it is necessary to improve the participation of all age groups into the European labour markets and to reach the EU 2020 target of 75% employment rate for women and men aged 20-64. Greater participation of older workers is an important aspect.

Different factors can contribute to this, ranging from enhancing employability of individuals and a better identification of skills needs, guidance on the reallocation of labour between different sectors, stronger support for job creation. Different actors are directly involved in addressing these challenges, ranging from enterprises of all sizes and individuals to national and European institutions.

2012 will be the “European Year for Active Ageing and Solidarity between Generations”, therefore putting the spotlight on a whole set of initiatives to be organised at local, regional, national and European levels, and bringing together stakeholders from governments, regional and local authorities, social partners and NGOs. Social partners and specifically employer organisations have an important role to play and intend to actively participate in the debate.

European employer social partners, together with their respective members are making efforts to improve participation in European labour markets. This includes facilitating training and up-skilling, improving the reallocation of workers such as by shifting older workers from ‘heavy’ to lighter work or by adapting workplaces, developing lifelong learning initiatives or promoting the use of flexible working arrangements. They contribute to policies that will foster a more proactive culture enabling people to better identify job opportunities and emphasising not only the challenges, but also the positive economic effects of active ageing on economic growth.

In this context, the European employers’ social partners BUSINESSEUROPE, CEEP and UEAPME have therefore undertaken to develop a better understanding of age management policies put in place by private and public services’ enterprises of all sizes and sectors across the European Union. They will identify examples of what enterprises are doing on the issue or foresee to do in the short and medium term. Furthermore, there is a need to look at incentives for employers, including financial ones, to find ways and effective solutions in a constantly changing environment.

The purpose of the present proposal is to enable European employers’ social partners to undertake this action that is due to span 12 months, in line with the European Year for Active Ageing. The methodology, activities and budget have been designed with this time frame in mind, and under the budgetary responsibility of BUSINESSEUROPE, on behalf of CEEP and UEAPME. It is worth mentioning that many member federations of BUSINESSEUROPE, CEEP and UEAPME have expressed their great interest in this project and intend to participate actively.

B. Objective

The overarching objective is to obtain a greater understanding and knowledge of how employers can encourage and facilitate the continued participation of older workers and increase the effective retirement age.

A large part of the rationale of this proposal is to capture examples of good practices from private and public services’ enterprises of all sizes in different sectors across the European Union.

It is anticipated that in terms of outcomes, lessons can be drawn on age management by enterprises as well as the framework contributing to efficient age management policies. It is also important to keep in mind the importance of the cross-industry social dialogue and that active ageing could be discussed within the framework of the European Social Partners work programme in the future.

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

- Map best practices from private and public services’ enterprises in the field of active ageing across all the 27 EU Member States;

- Identify positive and negative framework conditions impacting on age management policies at Member States level;
- Draw lessons on the best way to address the issue of active ageing at European level;
- Identify and discuss future actions and / or ways in which employers can work, separately or jointly with other European Social Partners, namely the European Trade Union Confederation, to better address demographic ageing and its impact on employment.

A background research phase carried out by the subcontracted expert will allow the European employer social partners BUSINESSEUROPE, CEEP and UEAPME to collect a number of best practices and select examples with the most interesting aspects and potential.

One EU-level conference, bringing together 100 participants from social partner representatives, enterprises of the 27 Member States, guest experts, representatives of the European Commission and representatives of the European Trade Union Confederation, will enable to present the selection of concrete case studies in order to exchange on the different employers' initiatives on active ageing.

C. Method

BUSINESSEUROPE is the applicant organization and will manage the joint project on behalf of all partners (BUSINESSEUROPE, CEEP and UEAPME).

To help partners to carry out the following activities, an expert will be subcontracted and will be selected on a joint basis.

The preparatory phase and desk research work necessary to complete the background paper will be entrusted to the subcontracted expert working under the supervision of a small steering committee in accordance with the methodology described below. The preparatory phase will allow the subcontracted expert to travel in order to meet with private and public enterprises of all sizes, and study more in detail examples of good practice.

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

1. **First phase: background research and paper**

After a first kick-off steering committee meeting of partners together with the subcontracted expert to be held in Brussels in December 2011, the first stage of the project will be to start mapping out examples of best practices at enterprise level in all 27 Member States, bearing in mind how the findings would feed in the European Year for Active Ageing.

The project will allow the subcontracted expert to conduct field research in order to meet with private and public services' enterprises. The choice of enterprises to be visited will be decided among partners together with the subcontracted expert. A travel fund for up to ten 2-day trips will be available for the subcontracted expert to analyse how enterprises tackle the issues of ageing.

An intermediate steering committee meeting to take place in Brussels no later than May 2012 with partners together with the subcontracted expert, to finalize a background paper that will be used for the EU-level conference. Partners will jointly decide at this stage, together with the subcontracted expert the content of the conference as well as key speakers.

2. Second phase: an EU-level conference

The conference would be scheduled to take place in September/October 2012. The objective of this stock-taking event would be to present a background paper where a series of examples of good practices are expected to be discussed as real case studies. Lessons and orientations that can be drawn from these examples, notably on possible future actions, will also be part of the background paper and will be examined and discussed.

It would be foreseen that a total of 100 participants would attend the EU-level conference, including employer organizations from all 27 EU Member States, representatives from private and public services' enterprises and experts. Representatives from the European Commission and from the European Trade Union Confederation will also be invited to participate.

This EU-level conference intends to bring genuine contribution to the European debate and to promote effective and efficient age management policies. It is also aimed at building awareness among BUSINESSEUROPE, CEEP and UEAPME members, and also national social partners to encourage longer working lives by the presence and full participation of older workers on the labour markets.

3. Third phase: synthesis

The subcontracted expert will prepare a synthesis based on the outcomes of the EU-level conference and from the overall findings of the project. The final synthesis document will be discussed on the occasion of a final steering committee meeting to take place no later than one month before the end date of the project, and will be widely disseminated and promoted.

Provisional Calendar of activities	
2011	
September	<ul style="list-style-type: none">• Launch of Call for Tender
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