

1. Title of the contract

Establishing of an EU network of academics and practitioners on workers' professional and geographical mobilities to analyse new patterns of mobility and corresponding national policy developments in the context of the EES and post 2010

2. Background

PROGRESS introduction

The Social Agenda (2005-2010) has fixed as its overall strategic goal to promote more and better jobs and to offer equal opportunities for all. The realisation of the Social Agenda relies on a combination of instruments comprising EU legislation, the implementation of open methods of coordination in various policy fields and financial incentives such as the European Social Fund.

The Decision n°1672/2006 establishing a Community programme for employment and social solidarity – PROGRESS was adopted by the European Parliament and the Council on 24 October and published in the OJ on 15 November.

PROGRESSSS aims at supporting the core functions of the European Community towards fulfilling its Treaty-delegated tasks and powers in its respective areas of competence in the employment and social sphere. PROGRESS mission is to strengthen the EU contribution in support of Member States' commitments and efforts to create more and better jobs and to build a more cohesive society. To that effect, PROGRESS will be instrumental in:

- *providing analysis and policy advice on PROGRESS policy areas;*
- *monitoring and reporting on the implementation of EU legislation and policies in PROGRESS policy areas;*
- *promoting policy transfer, learning and support among Member States on EU objectives and priorities; and*
- *relaying the views of the stakeholders and society at large.*

More specifically, PROGRESS will support:

- (1) the implementation of the European Employment Strategy (section 1);
- (2) the implementation of the open method of coordination in the field of social protection and inclusion (section 2);
- (3) the improvement of the working environment and conditions including health and safety at work and reconciling work and family life (section 3);

- (4) the effective implementation of the principle of non-discrimination and promotion of its mainstreaming in all EU policies (section 4);
- (5) the effective implementation of the principle of gender equality and promotion of its mainstreaming in all EU policies (section 5).

The present Call for tenders is issued in the context of the implementation of the 2009 annual plan of work which is consultable at <http://ec.europa.eu/progress>

3. Background

General background concerning labour mobility under the European Employment Strategy

Freedom of movement of workers is a fundamental right granted by the EC treaty to the citizens of the Union, which implies, inter alia, the right to move from one Member State to another in order to seek for employment. Labour mobility is a mean of creating a European labour market and of establishing a more flexible and more efficient labour market, to the benefit of citizens (be them workers or not), employers, and Member States. It allows individuals to improve their job prospects and allows employers to recruit the people they need. It is thus an important element in achieving an efficient labour market and a high level of employment.

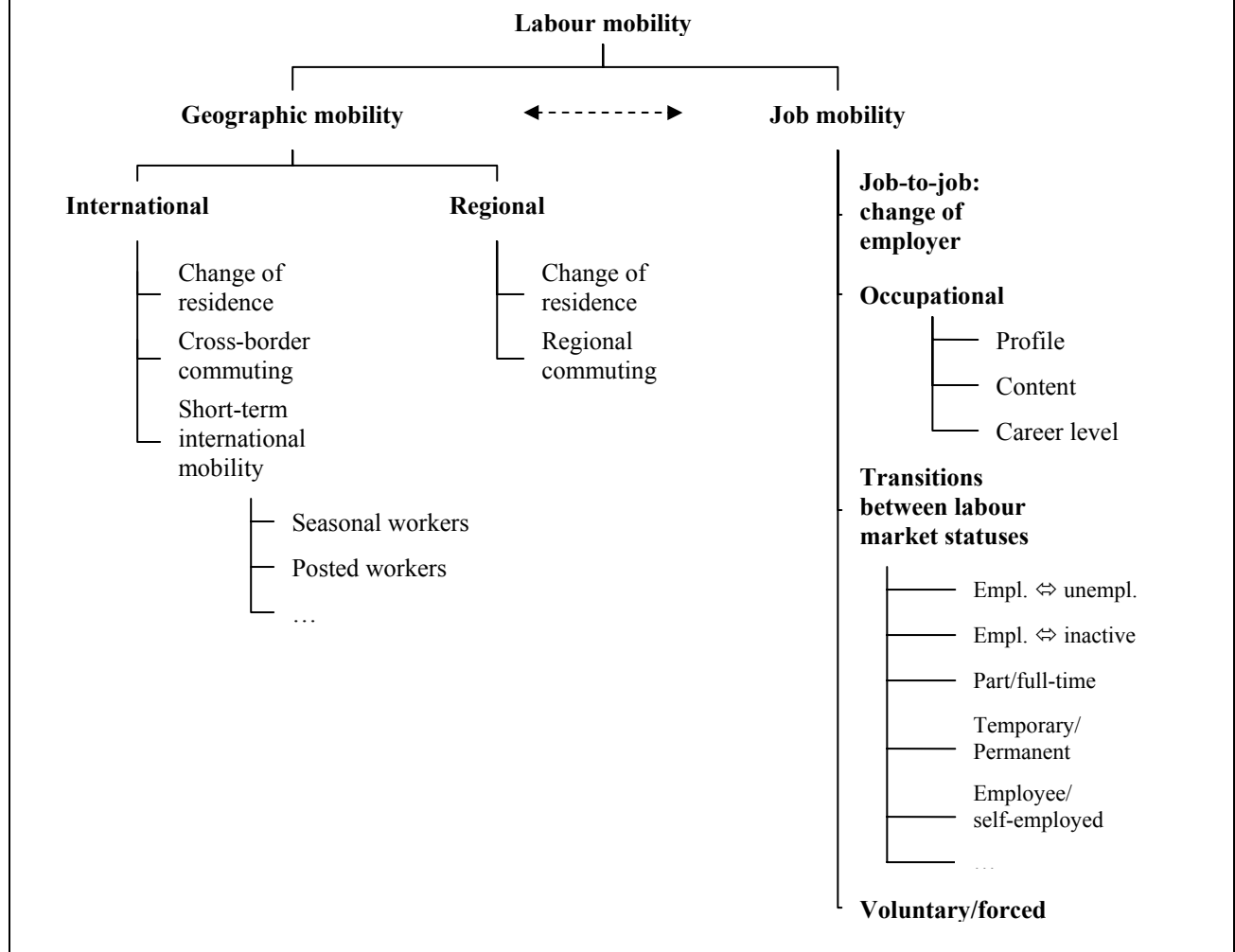
Labour mobility is a wide term which is typically used to describe a change in the labour market situation of a person or group of people. The literature often distinguishes between 'geographic' labour mobility on the one side and 'job' or 'occupational' mobility on the other. As shown in figure 1, job mobility can be divided into different categories.

In a narrow sense, **job mobility** consists in the simple change from one employer to another ('job-to-job' mobility). **Occupational mobility**, on the other hand, could be described as a change in a worker's job profile, content or career level and can happen with or without a change in employer. Job mobility in a wider sense can also consist in **transitions** between different labour market statuses, e.g. from unemployment or inactivity into employment. A number of studies also distinguish between voluntary and forced job transitions, in particular when assessing the costs and benefits of mobility. Voluntary transitions, for example, would be the result of a decision process in which the worker sees more advantages in changing the employer or leaving a job than staying on. Forced or involuntary transitions are caused by the employer (e.g. redundancies), by regulation or by health or age related factors.

Not necessarily, but often, job mobility goes hand in hand with a change in location, i.e. geographic mobility. **Geographic mobility** can either imply a move from one region to another within one country or a move across national borders.¹ Moreover, if place of residence and place of work are not the same, geographic mobility takes the form of regional or international commuting. In addition, durations of moves can vary. Many statistics and studies define labour migration as a change of residence and workplace for at least a year. However, short-term moves in the form of seasonal work, postings or intra-company assignments are another and, according to some evidence, increasingly frequent form of geographic mobility.

¹ In the EU policy context, geographic mobility is usually used to describe moves between Member States while the term 'migration' is reserved for moves between EU and non-EU countries. However, the scientific literature seldom makes this distinction and often uses the term (labour) migration to denote both moves within and outside the EU.

Figure 1: Types of labour mobility



As far as geographic international mobility is concerned, it is important to note that it remains relatively low:

- despite recent improvements, **only around 2% of workers (employed and unemployed) in the EU currently work and live in a Member State other than their own.**

- job to job mobility varies among Member States but is low in average. On average, **Europeans work at 3.9 places of employment over their career and the average period of work at any one employer is 8.3 years.**

Whether in the case of involuntary or voluntary mobility, workers do face barriers in making transitions from one labour market status to another. These barriers relate to issues that need to be tackled at various levels: local, regional, national and EU wide. In order to help removing obstacles at European level and to encourage the relevant authorities and stakeholders to deal with the obstacles at national, regional or local level, the European Commission launched in December 2007 a "Job Mobility Action Plan for 2007-2010"².

Action 14 of the Job Mobility Action Plan concerns the launch of the "European Job Mobility partnership" which is the subject of this call for tender.

² Mobility, an instrument for more and better jobs: The European Mobility Action Plan (2007-2010) COM(2007)773 final

4. Subject of the contract

This call for tender aims at launching the 'European Job Mobility Partnership' foreseen in the Job Mobility Action Plan under action 14. The initiative should host a network of stakeholders committed to developing overall job mobility in the EU. The network should provide scientific background and support in the mobility field. Mobility is to be understood as geographical and professional mobility.

The European Job Mobility Partnership would support the Commission in finding and gathering data, in providing information and analysis, and in mobilising stakeholders. The analysis does not concern the legal aspects of mobility in the context of free movement of workers under Article 39EC.

The network is expected to provide the European Commission with information on the EU Member States, EFTA/EEA countries and candidate and potential candidate countries covering policy themes agreed at the beginning of the contractual year with the European Commission.

Geographical coverage

The partnership should be able to provide expertise on the 27 EU Member States as well as the EFTA States in the context of the EEA agreement (Iceland, Norway and Liechtenstein). The partnership must also be able to provide expertise on the candidate countries (at present Turkey, Croatia, and the Former Yugoslav Republic of Macedonia) as well as on potential candidate countries (at present Albania, Montenegro, Serbia, Bosnia and Herzegovina and Kosovo under UN Security Council Resolution 1244).

5. Participation

Please note that:

- The competition is open to any physical person or legal entity coming within the scope of the Treaties and any other physical person or legal entity from a third country which has concluded with the Communities a specific agreement in the area of public contracts, under the conditions provided for in that agreement.
- Where the Multilateral Agreement on Public Contracts concluded within the framework of the WTO applies, the contracts are also open to nationals of States that have ratified this Agreement, under the conditions provided for therein. It should be noted that research and development services, which come under category 8 of Annex II A of Directive 2004/18/CE, are not covered by this Agreement.

6. Tasks to be carried out by the contractor

The contractor will establish and maintain a European network of experts in the labour mobility field. The network and the activities (national and thematic workshops and the annual conference), are identified as "the European Job Mobility Partnership". The Partnership shall be managed by a coordinator.

The contractor responsible for the Job Mobility Partnership should put in place the appropriate structure in order to fulfil the tasks set out below. The contractor is free to design this structure as s/he sees fit. In particular the contractor should propose a possible distribution of the budget between national and thematic workshops and the annual conference, on the one hand, and the functioning of the network, on the other.

The coordinator will run a network of 12 experts on labour mobility that will come from academia and other sectors. These senior experts shall be able to mobilize the necessary resources to assist them in carrying out the activities. The partnership will propose the "junior" experts to be sub-contracted to work in relation to the specific theme or policy.

The network shall be composed by 12 experts plus a coordinator. A proper gender balance must be ensured. The Commission would expect that the network sub-contracts specific tasks to ad-hoc "junior" experts covering specific fields including at national, regional and local level. When presenting the bid, the bidder shall already have identified the 12 experts that will compose the Partnership. The bidder has to provide the Commission with letters of commitment signed by each of the 12 experts.

The Commission expects that the responsibility for ensuring a strategic perspective and the overall quality of work would fall to the partnership (the 12 experts plus the coordinator). This group of experts will assist the coordinator in ensuring the overall quality of work and will be required to meet with the Commission services up to three times a year.

The contractor will need to involve around 9 senior experts from universities and research institutes. These experts should have a distinct track record and should be specialised in the fields of economics, business administrations, public administration, social studies, political science, or similar. These experts will need to ensure their availability to work for the partnership. The expert network should also comprise 3 practitioners, i.e. human resource managers, social partners' representatives, representatives of mobile workers. When presenting the bid, the bidder shall already have identified the experts the network will be composed of.

The coordinator will be responsible for the overall quality control of the work of the network in order to ensure that the Commission is provided with accurate, up-to-date and relevant information of the highest quality. The coordinator will be responsible for the liaison with the experts of the network, as well as the Commission services.

The contractor will be required to verify the source of any information provided by the experts and ensure a thorough quality check of any material provided.

In carrying out the contract, the contractor will liaise, as appropriate, with relevant officials from the Commission services and the Member States, Public Employment Services, with NGOs, social partners, Working Groups, Committees and high level groups established in this field, with other networks of experts, in particular with the Network on Freedom of Movement of Workers, established by the Directorate-general for Employment, Social Affairs and Equal Opportunities.

Description of the tasks

The tasks can be divided in two main groups. Tasks 1 to 4 encompass analytical activities. Tasks 5-7 target the mobilisation of stakeholders.

In detail, the contractor should carry out the following tasks:

Task 1: Analysis

Assist the Commission by providing information and expert assessment on developments of national mobility policies in the social, economic and political context, be they geographical or professional.

The network is expected to produce one report per year covering a set of three to four policy themes agreed at the beginning of the contractual year with the relevant European Commission service (Employment Services and Mobility Unit – EMPL/D/3). Indicative themes to be analysed by the network could include:

- Update on national trends and policy developments which are relevant in the context of EU policy development on geographic and professional mobility.
- Main national societal and economic issues having an impact on geographic and professional mobility.
- Mobility (geographic and professional) and particular target groups: long term unemployed, young workers, older workers, women, researchers, self-employed workers, seasonal workers, etc.
- Mobility flows to and from particular Member States and/or EFTA or Candidate countries.
- Correlation between skills and mobility.
- Data on crossborder commuting as well as professional mobility.
- Identification and analysis of barriers to geographical and professional mobility other than legal and administrative barriers relating to free movement principle and to social security/social protection rights.
- New patterns of mobility and corresponding national policy developments in the context of the European Employment Strategy post 2010

Task 2: Policy and operational advice

Identify and analyse key policy areas related to professional and geographical mobility. This might include, i.e., the financial and economic crisis situation as well as the post 2010 context. For these areas, the contractor should provide the Commission with advice on how to promote the mainstreaming of geographic and professional mobility. On each of the policy areas, to be agreed with the Commission services, the contractor will elaborate a draft and a report (approximately 10 to 20 pages) identifying key findings of the research, conclusions and recommendations. At least the following policies should be analysed:

- the National reform programmes of the EU Member States in the framework of the Lisbon Strategy. This will entail the analysis of the 27 National reform programmes from the point of view of professional and geographical mobility including their assessment;

- the European Employment strategy including the documentation and reporting available through the Open Method of Coordination;
- Council conclusions, Resolutions and Recommendations;
- European Parliament documents (Resolutions, reports, etc.)
- European Commission Communications and staff working documents;
- European Economic and Social Committee opinions
- Committee of the Regions opinions

Task 3: Ad-hoc requests

Respond to ad-hoc request from the Commission concerning country-specific and/or EU-wide developments. By way of example, the Commission might request analysis of the impact of the economic downturn on mobility and careers, and the concrete implementation of initiatives like "New skills for new jobs" and flexicurity. This will involve presenting a short written report (max. 5 pages) to the Commission within a short deadline (ten/fifteen working days). At least 30 working days per year for one person should be reserved for ad-hoc advice.

Task 4: Small scale studies

Respond to ad hoc requests from the Commission with a maximum of three small scale studies concerning geographical and professional mobility. This involves the preparation of a study of max 50 pages on specific issues related to geographical and professional mobility. The presentation of the study might involve the oral presentation to a group of officials or to an external audience. Thus three flights to/from Brussels per year should be included under this task.

Task 5: National Workshops

Organise 3 national workshops of 1.5 days in the Member States with around 50 participants. Audience should be experts, academics, national authorities (including national parliaments, public employment services, practitioners, companies, national organizations of social partners and civil society). The dates and venues of the workshops shall be agreed with the European Commission at the start of the contract. Themes for these workshops could e.g. include: "mobility flows", "the new patterns of geographical mobility", "the role of public employment services in transitional labour markets", etc.

Activities to support the workshops (non-exhaustive list):

- identifying an appropriate venue: 3/4-star or equivalent, accessible for disabled participants;
- reserving a meeting room with a capacity of up to 50 seated participants with tables;
- interpretation to and from English, French and German and the language of the host country;
- handling the reservation of accommodation and travel for up to 50 reimbursed participants (two nights' accommodation);
- contacting potential speakers and moderators in agreement with the Commission;

- drafting and translating the workshop program (English, French and German and the language of the host country);
- drafting and translating concept papers for the event in agreement with the Commission;
- dissemination of results in the form of a report of max. 30 pages in EN, FR, DE. This report will have to be delivered max. six weeks after the event. This report shall include policy recommendations;
- three meals (one lunch and two dinners) plus four coffee breaks for all 50 participants.

Task 6: Thematic workshops

Assist the Commission in developing working methodologies and tools to enhance the PES service provision to both jobseekers and employers as regards professional, transnational and crossborder geographic mobility. For this purpose, 2 thematic workshops of 1,5 days are to be organised every year in Brussels. They should bring together around 50 experienced participants in job mobility issues from different backgrounds - PES experts, practitioners, academics, social partners representatives, etc.). The groups shall keep a permanent composition for at least one year. The dates and venues of the meetings shall be agreed with the European Commission at the start of the contract.

Themes for these working groups or workshops could e.g. include: "PES services to employers", "PES services to graduates", "The return of mobile workers", "Integration and relocation of workers in foreign companies", "Establish and monitor an individual career plan for a mobile jobseeker", "Migration from third countries", etc. The objective will be to develop new working methods/recommendations to enhance the PES service provision to mobile workers, on the basis of the participants' experience and proposals. The contractor is also free to invite occasional expert speakers to make specialised presentations or analytical proposals to the working group/workshop members.

The contractor must be in the position to elaborate reports of the meetings (2-3 pages in EN, FR, DE) and elaborate on an annual basis - in consultation with the meetings' participants - at least one toolbox with tangible deliverables and recommendations. The report will have to be delivered within six weeks after the event(s) and the toolbox once a year (last quarter).

Activities to support the workshops (non-exhaustive list):

- identifying an appropriate venue: 3/4-star or equivalent, accessible for disabled participants;
- reserving a meeting room with a capacity of up to 50 seated participants with tables;
- interpretation to and from English, French and German;
- handling the reservation of accommodation and travel for up to 50 reimbursed participants (two nights' accommodation);
- contacting potential speakers and moderators in agreement with the Commission;
- drafting and translating the workshop program (English, French and German);
- drafting and translating concept papers for the event in agreement with the Commission;
- dissemination of results in the form of a report of max. 30 pages in EN, FR, DE. This report will have to be delivered max. six weeks after the event. This report shall include policy recommendations;
- three meals (one lunch and two dinners) plus four coffee breaks for all 50 participants.

Task 7: High-level conference: the European Job Mobility Day

Organise a one-day high level conference in Brussels (around 200 participants: experts, Commissioner, Commission officials, Members of the European Parliament, Presidency, Non Governmental Organisations, Social Partners organisations, Public Employment Services, etc.). The date and venue of the conference shall be agreed with the European Commission as soon as the contract starts (it is expected that this conference takes place in the last quarter of 2010). The contractor will be responsible for:

Activities to support the Conference (non-exhaustive list):

- identifying an appropriate venue: 3/4-star or equivalent, accessible for disabled participants;
- reserving a meeting room with a capacity of up to 200 seated participants with tables;
- interpretation to and from English, French and German;
- handling the reservation of accommodation and travel for up to 150 reimbursed participants (two nights' accommodation);
- contacting potential speakers and moderators in agreement with the Commission;
- drafting and translating the workshop program (English, French and German);
- drafting and translating concept papers for the event in agreement with the Commission;
- dissemination of results in the form of a report of max. 30 pages in EN, FR, DE. This report will have to be delivered max. six weeks after the event. This report shall include policy recommendations;
- three meals (one lunch and two dinners) plus four coffee breaks for all 200 participants.

Guide and details of how the tasks are to be carried out

The PROGRESS Programme aims at promoting gender mainstreaming in all its five policy sections and commissioned or supported activities. Consequently, the Contractor will take the necessary steps to ensure that:

- Gender equality issues are taken into account when relevant for the drafting of the technical offer by paying attention to the situation and needs of women and men;
- Implementation of the requested tasks includes a gender perspective by considering systematically women and men dimension;
- Performance monitoring includes the collection and gathering of data disaggregated by sex when needed.
- its proposed team and/or staff respects the gender balance at all levels.

Equally, needs of disabled people shall be duly acknowledged and met while executing the requested service. This will in particular entail that where the Contractor organises training sessions, conference, issues publications or develops dedicated websites, people with disabilities have equal access to the facilities or the services provided.

Finally, the Contracting Authority encourages the Contractor to promote equal employment opportunities for all its staff and team. This entails that the Contractor shall foster an appropriate mix of people, whatever their ethnic origin, religions, age, and ability.

The Contractor will be required to detail in its activity report accompanying the request for the final instalment the steps and achievements it made towards meeting these contractual provisions.

7. Professional qualifications required

See Annex IV of the draft contract

8. Time schedule and reporting

See Article I.2. of the draft contract.

The full duration of the contract shall not exceed 12 months from the date of signature of the contract. The contract may be renewed up to three times.

Additional requirements (specific deadlines for the performance of tasks):

The specific deadlines for the completion of each task set out at point 6 will be agreed and approved between the Commission and the contractor, on the proposal of the contractor to the Commission.

The contractor is asked to provide the following:

- An inception report in English. This should clarify the approach, organisation, and methodology of work. It should include a calendar of the various tasks and a detailed description of how the coordinator will organise and manage the different tasks under the contract. This inception report is due 1 month after the signature of the contract.
- An interim report in English. This should provide a detailed description of the tasks performed in the first semester and short term follow-up of each point mentioned. This report is due at the end of month 6 of the contract.
- A final report in English. This is due at the end of month 12 of the contract. It should contain a mist of the performed tasks during those 12 months and a brief description of those tasks.

All reports described above will be submitted in English language, in 3 hard copies as well as in electronic format (CD ROM). The executive summary of the final report has to be submitted in English, French and German.

The contractor should anticipate 4 working meetings with the Commission services, to take place in Brussels approximately every three months.

Publicity and information requirements

1.- As a matter of principle, with a view to favouring valorisation by the European Commission of all results obtained and outputs delivered under PROGRESS programme, the Contractor will be required to provide - either upon specific request or in any event with the final activity report - for each of the tasks required under the present Call the following:

- Presentation of their key points in one page. Key points should be concise, sharp and easily understandable. They shall be provided in English, French and German. Other Community languages would be welcome even if not compulsory.

- And an executive summary in 5/6 pages in English, French and German unless otherwise more precisely described in the section "tasks to be carried out".

2.- In accordance with the General conditions, the Contractor is under the obligation to acknowledge that the present service is delivered on behalf of the Community in all documents and media produced, in particular final delivered outputs, related reports, brochures, press releases, videos, software, etc, including at conferences or seminars, as follows.

This (publication, conference, training session) is supported for under the European Community Programme for Employment and Social Solidarity (2007-2013). This programme is managed by the Directorate-General for Employment, social affairs and equal opportunities of the European Commission. It was established to financially support the implementation of the objectives of the European Union in the employment and social affairs area, as set out in the Social Agenda, and thereby contribute to the achievement of the Lisbon Strategy goals in these fields.

The seven-year Programme targets all stakeholders who can help shape the development of appropriate and effective employment and social legislation and policies, across the EU-27, EFTA-EEA and EU candidate and pre-candidate countries.

PROGRESS mission is to strengthen the EU contribution in support of Member States' commitments and efforts to create more and better jobs and to build a more cohesive society. To that effect, PROGRESS will be instrumental in:

- *providing analysis and policy advice on PROGRESS policy areas;*
- *monitoring and reporting on the implementation of EU legislation and policies in PROGRESS policy areas;*
- *promoting policy transfer, learning and support among Member States on EU objectives and priorities; and*
- *relaying the views of the stakeholders and society at large*

For more information see:

<http://ec.europa.eu/social/main.jsp?catId=327&langId=en>

For publications it is also necessary to include the following reference: *"The information contained in this publication does not necessarily reflect the position or opinion of the European Commission"*

With regard to publication and any communication plan linked to the present service, the Contractor will insert the European Union logo, and if any another logo developed for the employment and social solidarity fields, and mention the European Commission as the Contracting Authority in every publication or related material developed under the present service contract.

Reporting requirements

PROGRESS will be implemented through a results-based management - RBM. Managing for outcomes and results is about working to maximise results for European citizens. This includes:

- Identifying the most important results for European citizens;
- Managing for these results, including setting clear desired results, implementing plans based upon these results and learning about ‘what works’ in the process;
- Seizing opportunities to work together whenever this helps achieve the results.

As a first step, a Strategic Framework for the implementation of PROGRESS has been developed in collaboration with Member states and organisations from the civil society. The Strategic Framework provides the framework for implementing PROGRESS, complemented by the Performance Measurement, which defines PROGRESS mandate, its long-term and specific outcomes. See in Annex the overview of PROGRESS performance measurement framework. For more information on the strategic framework, please visit PROGRESS website.

The Commission will in that context monitors the effect of PROGRESS supported or commissioned initiatives and considers how these initiatives contributes to PROGRESS outcomes as defined in the Strategic Framework. In that context, the Contractor will be asked to loyally work in close cooperation with the Commission and/or persons authorised by it to define their expected contributions and the set of performance measures against which their contribution will be assessed. The Contractor will be asked to collect and report on its own performance to the Commission and/or persons authorised by it against a template that will be attached as annex VI to the contract. In addition, the Contractor will make available to the Commission and/or persons authorised by it all documents or information that will allow PROGRESS performance measurement to be successfully completed and to give them the rights of access.

9. Payments and standard contract

In drawing up the bid, the tenderer should take into account the provisions of the standard contract comprising the "General terms and conditions applicable to service contracts".

Payments will be made at intervals throughout the contract period as a function of the progress made, the reports submitted and the quality of the work undertaken.

- **Pre-financing**

Following signature of the Contract by the last contracting party, within 30 days of the receipt by the Commission of a duly constituted financial guarantee equal to at least the invoiced pre-financing amount, a pre-financing payment equal to 20% of the total amount referred to in Article I.3.1 of the contract shall be made.

- **Interim payment**

Requests for interim payment by the Contractor shall be admissible if accompanied by

- the intermediate report in accordance with the instructions laid down in Annex I of the contract,
- the relevant invoices,

- statements of reimbursable expenses in accordance with Article II.7 of the contract provided the report has been approved by the Commission.

The Commission shall have 60 days from receipt to approve or reject the report, and the Contractor shall have 30 days in which to submit additional information or a new report. Within 30 days of the date on which the intermediate report is approved by the Commission, an interim payment corresponding to the relevant invoices, up to maximum 60% of the total amount referred to in Article I.3.1 of the contract, shall be made.

- **Payment of the balance**

The request for payment of the balance of the Contractor shall be admissible if accompanied by:

- the final technical report in accordance with the instructions laid down in Annex I of the contract,
- the relevant invoices,
- statements of reimbursable expenses in accordance with Article II.7 of the contract provided the report has been approved by the Commission.

The Commission shall have 60 days from receipt to approve or reject the report, and the Contractor shall have 30 days in which to submit additional information or a new report. Within 30 days of the date on which the report is approved by the Commission, payment of the balance of the total amount referred to in Article I.3.1 of the contract shall be made.

10. Prices

The total price of the offer will not exceed € 1.000.000,00 (Euro one million) per year. Bidders should note that any bid exceeding these limits will not be considered.

Under the terms of Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, the latter are exempt from all charges, taxes and duties, including value added tax; such charges may not therefore be included in the calculation of the price quoted. The amount of VAT is to be indicated separately.

The price must be stated in EUR(€), net of VAT (using, where appropriate, the conversion rates published in the C series of the Official Journal of the European Union on the day when the invitation to tender was issued), and broken down according to the model in Annex III included in the attached standard contract.

Part A: Professional fees and direct costs

- Fees, expressed as the number of person-days multiplied by the unit price per working day for each expert proposed. The unit price should cover the experts' fees and administrative expenditure, but not the reimbursable expenses referred to below.
- Other direct costs (please specify in detail)
 - o Any translation expenses.
 - o Expenses for the shipment of equipment or unaccompanied luggage, directly connected with performance of the tasks specified in Article I.1 of the contract.

Part B: Reimbursable expenses

- Travel expenses (other than local transport costs) and subsistence expenses of the Contractor and his staff (covering the expenditure incurred by experts on short-term trips outside their normal place of work) relating to meetings between the contractor and the European Commission during the contract period upon request of the European Commission.
- Contingencies

Total price = Part A + Part B= 1.000.000 € maximum

11. Groupings of economic operators or consortia

Tenders can be submitted by groupings of service providers/suppliers who will not be required to adopt a particular legal form prior to the contract being awarded, but the consortium selected may be required to assume a given legal form when it has been awarded the contract if this change is necessary for proper performance of the contract³. However, a grouping of economic operators must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination. The documents required and listed in the following points 12 and 13 of the tender specifications must be supplied by every member of the grouping.

Each member of the grouping assumes a joint and several liability towards the Commission.

12. Exclusion criteria and supporting documents

1) Bidders must provide a declaration on their honour, duly signed and dated, that they are not in one of the situation referred to in Articles 93 and 94 a) of the Financial Regulation.

Those articles are as follows:

"Article 93:

Applicants or tenderers shall be excluded if:

- a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of res judicata;

³ These entities can take the form of an entity with or without legal personality but offering sufficient protection of the Commission's contractual interests (depending on the Member State concerned, this may be, for example, a consortium or a temporary association).

The contract has to be signed by all members of the group, or by one of the members, which has been duly authorised by the other members of the grouping (a power of attorney or sufficient authorisation is to be attached to the contract), when the tenderers have not formed a legal entity.

- c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- d) they have not fulfilled their obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) they have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
- f) they are currently subject to an administrative penalty referred to in Article 96(1)⁴.

(...)

Article 94 :

Contracts may not be awarded to candidates or tenderers who, during the procurement procedure:

- a) are subject to a conflict of interest;
- b) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or fail to supply this information;(...)"

2) The tenderer to whom the contract is to be awarded shall provide, within a time limit defined by the contracting authority and preceding the signature of the contract, the evidence referred to in Article 134 of the implementing Rules, confirming the declaration referred to in point 1 above.

Article 134 of the Implementing Rules – Evidence

§3. The contracting authority shall accept as satisfactory evidence that the candidate or tenderer to whom the contract is to be awarded is not in one of the situations described in point (a), (b) or (e) of Article 93(1) of the Financial Regulation, a recent extract from the judicial record or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. The contracting authority shall accept, as satisfactory evidence that the candidate or tenderer is not in the situation described in point (d) of Article 93(1) of the Financial Regulation, a recent certificate issued by the competent authority of the State concerned.

Where the document or certificate is not issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

§4. Depending on the national legislation of the country in which the candidate or tenderer is established, the documents referred to in paragraph 3 shall relate to legal persons and/or

⁴ "Article 96(1): The contracting authority may impose administrative or financial penalties on the following:

- (a) candidates or tenderers in the cases referred to in point (b) of Article 94;
 - (b) contractors who have been declared to be in serious breach of their obligations under contracts covered by the budget.
- (...)"

natural persons including, where considered necessary by the contracting authority, company directors or any person with powers of representation, decision-making or control in relation to the candidate or tenderer.

See Annex I (which may be used as a checklist) for the supporting documents accepted by the European Commission to be provided by applicants, tenderers or tenderers to who the contract will be awarded.

3) The contracting authority may waive the obligation of a candidate or tenderer to submit the documentary evidence referred to in Article 134 of the Implementing Rules, if such evidence has already been submitted to it for the purposes of another procurement procedure launched by DG EMPL and provided that the issuing date of the documents does not exceed one year and that they are still valid.

In such a case, the candidate or tenderer shall declare on his honour that the documentary evidence has already been provided in a previous procurement procedure and confirm that no changes in his situation have occurred.

13. Selection criteria

The candidates will be selected on the basis of their financial and economic capacity and their professional and technical capacity as follows:

a) Economic and financial capacity:

Tenderers must provide sufficient information to satisfy the Commission of their financial standing and more particularly that they have the necessary resources and financial means to carry out the work that is the subject of the tender and that the tenderer is viable for the duration of the contract.

The following three documents must be provided:

- A bank declaration providing evidence of sound financial standing. In the case of tenders from groupings or consortia, this certificate must be provided by each member of the grouping or consortium.
- A statement of the tenderer's overall turnover that is at least 100% of the value of this contract (1.000.000 €) in the last financial year. In the case of tenders from consortia the overall turnover of the consortium has to be taken into account;
- Accounts - balance sheets and profit and loss accounts - for the last two financial years, where publication of the balance sheets is required under company law in the country in which the service provider is established: in the case of tenders from groupings or consortia, this certificate must be provided by each member of the consortium.

If for some exceptional reason which the contracting authority considers justified, the tenderer or candidate is unable to provide the references requested by the contracting authority, he may prove his economic and financial capacity by any other means which the contracting authority considers appropriate.

b) Technical and professional capacity:

The contractor will need to show the capacity to run large scale networks at European level and have a proven capacity to manage the administrative and financial aspects of such a contract.

For the **coordinator** of the contract, this will require:

- Proven capacity to perform the coordination and the administrative tasks involved in organising and managing a network, contracts and projects at European level. The Commission will assess this criterion on the basis, *inter alia*, of a list of previous activities in this field submitted by the tenderer;
- The proven ability to set up the appropriate organisational structure to carry out all the tasks involved, in particular the ability to call on the necessary expertise to cover all the fields mentioned in the tender specifications;
- Excellent knowledge of EU working languages and in particular English to facilitate communication with the Commission;
- Strong planning and organisational skills and the ability to conduct and facilitate meetings;
- Availability, in terms of working time, to act as a proactive agent in the establishment and running of the partnership.

For the 9 **senior experts**, this will require:

- The majority of experts shall have at least a 10-year experience, preferably academic, in one or more of the following fields: labour mobility, geographical mobility, labour market institutions, labour economics, and labour market policies;
- Each expert must possess a proven experience of minimum 5 years in the field of European policies;
- Each expert must possess strong analytical capacity, the ability to make presentations and to facilitate meetings;
- Each expert must be proficient in English and/or French apart from his/her national language;
- Each expert will need to ensure his/her availability to work for the partnership;
- Some experts should have at least a five-year experience of proven record of working with policy makers at national and/or EU level;

For the 3 **practitioners**:

- They can be selected among persons with the following profiles or drawn from the following organisations: employment advisers to policy makers at national and/or EU level; human resources managers from companies; representatives of private employment services; representatives of public employment services; local and regional authorities, in particular from crossborder areas where there is high commuting; representatives from sectoral organisations at EU level; multipliers; non governmental organisations; social partners at EU level.
- They should have at least a 5-year experience in the organisation from which they are coming from;
- They must possess a proven experience of minimum 3 years in the fields of European policies;

- Each expert must possess strong analytical capacity, the ability to make presentations and to facilitate meetings;
- Each expert must be proficient in English and/or French apart from his/her national language;

With regard to **the logistical tasks** involved (i.e. tasks 5 to 7) this will require:

- The proven capacity to organise and manage national and European level conferences, seminars and workshops including all organisational matters spelled out in tasks 5 to 7).

Means of proof required

Technical and professional capacity of the tenderer shall be evaluated and verified on the basis of the following:

- List of experts (including the coordinator) together with their CVs, qualifications and list of publications;
- List of persons together with their CVs who will be in charge of the logistical tasks involved (tasks 5 to 7)
- A declaration by the applicant certifying his/her technical capacity and the competence of the team to carry out the services;
- Letters of commitment signed and dated from each of the 12 experts and from any external person to the bidder's organisation stating their commitment to be involved in the implementation of the contract in case the bid should be successful;
- A declaration by the co-ordinator certifying that the language skills are sufficient to execute the tasks efficiently. The contractor or consortium should demonstrate solid linguistic capability covering at least the three working languages of the Commission (English, French, German,) and should ensure that the project contains provision for interpretation and translation if this is considered necessary by the contractor.

In the case of tenders from consortia, grouping of service providers/suppliers:

- clear identification of the co-ordinator of the work who will also be responsible for signing the contract, and
- written confirmation from each member of the consortium that they would be ready and willing to participate in the project, and describing their role.

Tenderers not meeting the abovementioned requirements on economic, financial and technical capacity will be excluded from further assessment of their bids.

14. Award criteria

The contract will be awarded to the bid offering the best price/quality ratio, taking account of the following criteria:

- (i) Quality of the proposal (40%)
 - Understanding of the nature of the project, the context and the results to be achieved;

- Efficiency, quality and usefulness of the proposed solutions;
- (ii) Technical value of the offer (30%)
 - Presentation of overall working methods
 - Capacity to liaise with all the relevant actors
- (iii) Work organisation (30%)
 - Administrative and logistical tasks, in particular those related to tasks 5 to 7
 - Feasibility of the time schedule proposed
 - Clarity and coherence of the work plan, efficient distribution of staff competencies
 - Structure of team with regard to the identification and distribution of tasks

Please note that the contract will not be awarded to any bid that receives less than 70 % in the award criteria.

The points total will then be divided by the price, with the highest-scoring bid being chosen.

15. Content and presentation of bids

Content of bids

Tenders must include:

- all information and documents necessary to enable the Commission to appraise the bid on the basis of the selection and award criteria (see points 13 and 14 above);
- a bank ID form duly completed and signed by the bank;
- a "legal entity" form duly completed;
- the price;
- the detailed CVs of the proposed experts;
- the name and function of the contractor's legal representative (i.e. the person authorised to act on behalf of the contractor in any legal dealings with third parties);
- proof of eligibility: tenderers must indicate the State in which they have their registered office or are established, providing the necessary supporting documents in accordance with their national law.

Presentation of bids

Bids must be submitted in triplicate (i.e. one original and two copies).

They must include all the information required by the Commission (see points 10, 11, 12 and 13 above).

They must be clear and concise.

They must be signed by the legal representative.

They must be submitted in one of the official languages of the European Union

They must be submitted in accordance with the specific requirements of the invitation to tender, within the deadlines laid down.

OVERVIEW OF PROGRESS PERFORMANCE MEASUREMENT FRAMEWORK

PROGRESS Ultimate Outcome

Member States implement laws, policies and practices in a manner that contributes to the desired outcomes of the Social Agenda

PROGRESS works toward its ultimate outcome by helping strengthen the EU's support for Member States' efforts to create more and better jobs and to build a more cohesive society. PROGRESS seeks to contribute to (i) an **effective legal regime** in the EU in relation to the Social Agenda; (ii) **shared understanding** across the EU with regard to Social Agenda objectives; and (iii) **strong partnerships** working toward Social Agenda objectives.

In operational terms, support provided by PROGRESS facilitates (i) provision of analysis and policy advice; (ii) monitoring and reporting on the implementation of EU legislation and policies; (iii) policy transfer, learning and support among Member States; and (iv) relaying to decision-makers the views of the stakeholders and society at large.

Legal Regime Outcome:

Compliance in Member States with EU law related to PROGRESS areas.

Performance Indicators

1. ~~Transposition rate of EU law on matters related to PROGRESS policy areas~~
2. Effectiveness of application in Member States of EU law on matters related to PROGRESS policy areas.
3. EU policies and legislation are grounded in thorough analysis of situation and responsive to conditions, needs and expectations in Member States in PROGRESS areas
4. Extent to which PROGRESS-supported policy advice feeds into the development and implementation of EU legislation and policies
5. Cross-cutting issues are addressed in PROGRESS policy sections
6. EU policies and legislation display a common underlying logic of intervention in relation to PROGRESS issues
7. Gender mainstreaming is systematically promoted in PROGRESS

Shared Understanding Outcome:

Shared understanding and ownership among policy/decision-makers and stakeholders in Member States, and the Commission, of objectives related to PROGRESS policy areas.

Performance Indicators

1. ~~Attitudes of decision-makers, key stakeholders and general public regarding EU objectives in PROGRESS policy areas~~
2. Extent to which national policy discourses or priorities reflect EU objectives
3. Extent to which principles of good governance (including minimum standards on consultation) are respected in policy debate
4. Extent to which the outcomes of policy debates feed into the development of EU law and policy.
5. Greater awareness of policy-and decision-makers, social partners, NGOs, networks regarding their rights/obligations in relation to PROGRESS policy areas
6. Greater awareness of policy-and decision-makers, social partners, NGOs, networks regarding EU objectives and policies in relation to PROGRESS policy areas

Strong Partnerships Outcome:

Effective partnerships with national and pan-European stakeholders in support of outcomes related to PROGRESS policy areas.

Performance Indicators

1. ~~Existence of common ground/consensus among policy and decision-makers and stakeholders on EU objectives and policies~~
2. Identification and involvement by the EU of key actors in a position to exert influence or change at EU and national levels
3. Effectiveness of partnerships in relation to outcomes related to PROGRESS policy areas.
4. Number of individuals served or reached by networks supported by PROGRESS.
5. Extent to which advocacy skills of PROGRESS-supported networks have improved
6. Satisfaction of EU and national authorities with the contribution of networks
7. Extent to which PROGRESS-supported networks take a cross-cutting approach