



SPECIFICATIONS FOR THE SUB-CONTRACTING OF EXTERNAL EXPERTISE

Strengthening the role of worker representation bodies and trade union organisations within the framework of restructuring operations (200607)

1. General provisions

ETUC is planning on conducting a project for its member organisations and the bodies that represent national and transnational workers.

The project has two core objectives:

- 1) Gain a better understanding of the view of worker representation bodies (European and national works councils, ETUC member unions in EU-25) as regards restructuring by conducting a study;
- 2) Develop a joint stance for the European trade union movement on the subject.

The project should enable us to identify and promote, from a trade union perspective, measures pertaining to the management of information, consultation and cooperation with a view to helping to anticipate change and prevent or resolve disagreements occurring within restructurings, mergers and relocations.

The project will be implemented in four phases:

Phase 1: Compile and send out a survey and conduct interviews.

Phase 2: Organise the three decentralised seminars.

Phase 3: Final conference.

Phase 4: Publication and dissemination of the final report which will also be put on the ETUC website.

2. Subject of the contract

To employ one or two experts from the same company who will be responsible for:

- drawing up the survey and processing the results and conducting interviews with relevant players in France, the United Kingdom, Hungary, Germany, Spain, Finland, Poland, Denmark and the Czech Republic over a period of three days;
- summarising the studies and discussions within the three decentralised seminars.
- supporting discussions during the final conference;
- participating in the final conference;
- helping to compile the final report.

3. Tasks to be performed by the contracting party

3.1. Description of tasks

The contracting party will, in particular, have to:

- work together with the project management team, primarily under the lead of the steering committee;
- put forward an analysis grid/questionnaire for the survey and conduct interviews in the nine EU countries on the following aspects :
 - compile a list on the topic of restructuring so as to anticipate the phenomenon, its scale and how worker representatives in the worker representation bodies and the activists in the trade union organisations react;
 - analyse the actual or potential role of these players in the restructuring operations. The evaluation must focus on the extent that these people play or do not play a role in making suggestions and performing actions. * Do the trade unions and the worker representative bodies have a joint approach according to the cases studied?
* Is this a preventive approach?
- process the results of the survey;
- summarise the studies and discussions;
- help to compile the final report.

4. Skills required

The contracting party must demonstrate that:

- s/he has experience with trade union matters;
- s/he has experience in the area relevant to the project, primarily as regards studies and transnational experience with restructurings, mergers and relocations. These skills are essential for successfully conducting the project;
- s/he has the required linguistic capacities (French and English);
- s/he is a good team player.

5. Timetable and reports

The dates for submitting the results of the studies and interviews shall be determined in the project steering committee.

6. Payment and type of contract

Payment will be made in two instalments:

1. first instalment of 30% of the total amount upon signature of the contract;
2. the remainder upon receipt of the full invoice.

7. Price

Payment conditions for the expert or experts selected are regulated under the conditions of a contract with the European Commission. Consequently, the payment conditions are non-negotiable and do not constitute a selection criterion for the offer. It is expected that the task will take 48 working days, for which the expert(s) will receive €500 per day.

Moreover and in addition to the expert(s)'s fees, the conditions for travel and accommodation for the interviews in the relevant countries (see chapter 2 of the specifications) are as follows:

- travel: studies and interviews = 380 x 1 person x 9 trips = €3,420
- accommodation: studies and interviews = 150 x 2 people x 27 days) = €4,050.

The travel and accommodation costs for the steering committee meetings, the seminars and the final conference will be paid directly by ETUC.

Other travel and accommodation expenses will be organised and managed directly by the ETUC Organisation Department.

8. Selection criteria

The contract will be awarded to the tenderer with the best quality/price ratio. Account shall also be taken of the following criteria:

- evidence of previous work in the area relevant to the project;
- ability to work in a team;
- ability to work in English and French;
- availability to attend steering committee meetings, the three decentralised seminars and the final conference.

9. Content and presentation of the offer

The offer, which must be submitted in English or French, must include the following:

- an official application letter;
- a detailed CV;
- a budget in euro in accordance with the regulations set by the Commission;
- the applicant's offer specifying how the objectives of the tender will be met, the proposal must also contain a detailed description of the method and means to be used to carry out the work;
- a declaration of the sub-contractor, in which s/he accepts to undergo any control or audits performed by the Commission, which the beneficiary would also be obliged to undergo;
- information on the experience of the sub-contractor in similar areas.

10. Publication and terms of the call for tenders

Offers must be received within 20 days of 22 September 2006, the date of publication of this call for tenders on the website of the European Trade Union Confederation website and sent to five potential providers.

The call for tenders will be published on 22 September 2006. All bids must be received in writing by 13 October 2006, for the attention of Ms Maria Helena André.

In the interests of confidentiality, experts 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 "**appel d'offres – à ne pas ouvrir pas le service du courrier**" (*tender – not to be opened by the mail department*). If self-adhesive envelopes are used, they must be sealed with adhesive tape crossed by the signature of the sender.

A committee of three persons will be formed comprising three equal representatives of ETUC's organisational entities. 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.

An evaluation committee will then be formed, comprising three equal representatives of ETUC's organisational entities. That committee will 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;
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 this choice in terms of the selection or award criteria.

The contracting authority will then make its decision.

All candidates must either deliver their bid by hand or submit them by registered letter to Ms Maria Helena André, 200607: Bd du Roi Albert II 5 – 1210 Brussels.

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

For requests submitted by private courier service and hand-delivered requests, a receipt signed by the European Trade Union Confederation's mail department, stamped on the date of the deadline for submission (4 p.m. for this call for tenders) if not before, will serve as proof of delivery.

MHA/MM/JB/RB-21/09/2006

EUROPEAN TRADE UNION CONFEDERATION
CONFEDERATION EUROPEENNE DES SYNDICATS

John Monks, General Secretary

Boulevard du Roi Albert II, 5 • B - 1210 Bruxelles • Tel: +32 2 224 04 11
Fax: +32 2 224 04 54 / 55 • e-mail: etuc@etuc.org • www.etuc.org