



## CALL FOR TENDERS

for the sub-contracting of external expertise within the framework of a European Trade Union Confederation (ETUC) project on:

### **Corporate Social Responsibility (CSR) Trade union position on the EU's new strategy for 2011-2014**

#### **1. Context**

The Commission's Green Paper on CSR in July 2011 – followed by the implementation of a Multi-Stakeholder Forum (MSF) – raised the trade union movement's expectations of CSR in a number of respects. However, the way in which the discussions (which ended on 29 June 2004) unfolded in the MSF and the gradual transfer of this issue from the Directorate-General for Employment to the Directorate-General for Enterprise prompted the ETUC to adopt a resolution that strongly criticised the whole enterprise (Executive Committee meeting of 9 and 10 June 2004).

In parallel with this process, the ETUC developed its own position on CSR.

The failings of the Commission Communication of 22 March 2006, the definition of CSR given there and the establishment of a 'European Alliance for Corporate Social Responsibility' open only to businesses, but effectively responsible for implementing various aspects of the Communication, ultimately caused NGOs and the ETUC to withdraw from the Community process to invest elsewhere.

The new Communication of 25 October 2011, which conceded that "important challenges remain" despite the progress made, contains significant improvements vis-à-vis the Communication from 2006. It set out commendable intentions, but still insufficient concrete actions.

In its resolution, the ETUC endorsed the new Commission Communication on CSR, particularly the new definition of corporate social responsibility as well as a precise agenda for action for 2011-2014. This agenda for action incorporates around 30 proposals based on eight objectives, although it does prioritise the limitations mentioned above.

The ETUC intends to take advantage of the opportunities afforded by the agenda for action 2011-2014 to make improvements to that agenda on the basis of our trade union priorities. By means of a new European project, the Secretariat will coordinate these actions with the members by setting up an ad-hoc working group in 2012, which will be responsible for reporting on changes in positions and the recent experiences of members in terms of CSR.



**To this end, it is essential that we proceed with internal trade union meetings so that we can exchange ideas on this topic at European level and, above all, so that we are in a position to give an up-to-date opinion on the matter.**

## **2. Purpose of the contract and expectations**

The purpose of this call for tenders is to select a consulting firm that will produce a study on CSR that the ETUC will use as a basis when drafting its policy message and a European trade union contribution regarding the agenda for action 2011-2014.

An investigation was carried out in the ETUC's member organisations in 2006. Three main issues formed the basis for the study:

- ▶ the organisation's familiarity with the concept of CSR;
- ▶ follow-up to trade union action and activities related to CSR;
- ▶ future trade union action involving CSR.

A final report in 2012, based on a series of national reports, gives an overview of the main results in English and French.

We think it would be very interesting to evaluate the changes, any progress made and CSR initiatives six years on.

- Which measures have been implemented following the ETUC resolution in 2004?
- Which good practices have been implemented?
- Which (new) organisations have taken up the issue?

To this end, we would like to conduct, with the aid of an external expert, a new general survey of the trade-union commitment to CSR.

The expert will send questionnaires to the ETUC's member confederations and federations. Visits to the six target countries (Germany, Sweden, the United Kingdom, France, Italy and Poland) will be required to enable the expert to carry out the study.

The expert will also be responsible for compiling reports on the seminar and conference being held on 29-30 November 2012 and March 2013 respectively.



### **3. Plan**

#### Preparation phase (October – November 2012)

- A Steering Committee coordination meeting
- Preparation of the survey questionnaire and collection of the data (desk research) by the expert
- Planning of the expert's visits to the six target countries to carry out the study

#### Implementation phase (December 2012 – February/March 2013)

- Seminar in Brussels on 29 and 30 November 2012
- Visits to the six target countries
- Drafting of the study and of a working document for the conference (including the study's findings)
- A Steering Committee coordination meeting

#### Monitoring and distribution phase (March/April – July 2013)

- Presentation of the working document (first draft of the study and its findings) at a conference in Brussels in March or April 2013
- Finalisation of the study and distribution in the network of ETUC member organisations
- A Steering Committee coordination meeting

### **4. Tasks to be performed by the contracting party**

The contracting party will be responsible for:

- ▶ preparing a questionnaire and collecting data from trade union organisations affiliated with the ETUC (desk research, interviews, qualitative survey) and processing the acquired information;
- ▶ visiting the six target countries (Germany, Sweden, the United Kingdom, France, Italy and Poland) and interviewing those involved;
- ▶ drafting a working document (approx. 10 pages) for the conference (first draft of the study and its main findings);
- ▶ writing up the study on CSR (approx. 80 pages), which will be distributed in our member organisations and interested stakeholders; the study will be produced in English and French and 1,000 copies will be printed – it will be based on the results of the questionnaire, the collected data and the visits to the target countries;



- ▶ drawing up a report (10 pages) on the two main stages of our work (i.e. the seminar and the final conference).

The Steering Committee will supervise the drafting of the paper. The Committee comprises ETUC Deputy General Secretary Patrick Itschert (whose duties include dealing with CSR-related issues), Juliane Bir, the advisor responsible for monitoring this project in the ETUC, and the external expert who has been given the task of carrying out the aforementioned work.

The Steering Committee will set out the content of the questionnaire and will approve how the external expert will collect and process the data.

### **5. Skills required**

The contractor must prove that the (team of) expert(s) responsible for gathering data and drafting the paper has:

- an excellent command of English and French (a third language would be a bonus);
- plenty of knowledge about the subject of the project, namely CSR;
- a background in drafting studies on and conducting research into industrial relations, social dialogue and, above all, CSR;
- been involved in European projects;
- experience in drafting documents for a mass audience;
- ability to adhere to a project's set deadlines;
- ability to work in a team.

### **6. Timetable and reports**

The collection of data/research required by the project is scheduled from October 2012 to March 2013.

Then a working document (first draft of the study and its findings) will be presented at the final conference on the project that will be held in either March or April 2013.

The Steering Committee will decide on the exact dates when the various reports and documents must be submitted.



## **7. Price**

Payment conditions for the selected expert/consulting firm 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. The selected expert/consultancy company will be paid a basic fee of up to €19,250 for the work performed.

## **8. Payment**

Payment will be made in three instalments:

- the first instalment of 30% of the total amount upon signature of the contract;
- the second instalment upon submission of the research report;
- the remainder upon receipt of the full invoice once the Steering Committee has approved the content of the booklet to be distributed.

## **9. Selection criteria**

The contract will be awarded to the expert with the best quality/price ratio. The following criteria will be taken into account:

- experience, CV, evidence of previous work in the area relevant to the project;
- ability to work in a team;
- ability to work in English and French;
- ability to draft reports in English or French;
- ability to adhere to the timetable;
- adherence to the budget;
- availability to attend Steering Committee meetings, the seminar on 29 and 30 November 2012 and the final conference in March or April 2013.

## **10. 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 for each of the managers of the Consortium and the experts;
- a budget in euros in accordance with the regulations set by the European Commission;
- the applicant's offer specifying how the objectives of the tender will be met;
- information on the sub-contractors' experience in similar areas.



## **11. Publication and terms of the call for tenders**

Offers must be received within 17 days of the date of publication of this European Trade Union Confederation call for tenders.

**The call for tenders will be published on 7 September 2012 (published on the website of the ETUC ([www.etuc.org](http://www.etuc.org)) and sent to three potential service providers). All bids must be received by 24 September 2012, for the attention of Mr Alexandre Martin, ETUC, responsible for projects and EU funding, either by e-mail ([amartin@etuc.org](mailto:amartin@etuc.org)) or by post (Bd du Roi Albert II no. 5 – B-1210 Brussels).**

A committee of three persons will be formed comprising three equal representatives of the 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 the 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 the 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 justification for their selection;
4. the name of the suggested candidate and justification of this choice in terms of the selection or award criteria.

The contracting authority will then make its decision and will pass this on to all the candidates.