



CALL FOR TENDERS FOR SUBCONTRACTING EXPERTISE

This is a call for a subcontractor(s) to provide expertise as part of the implementation of the ETUC project **"REBALANCE: Trade unions' and social partners' actions to improve reconciliation of work, family and private life for women and men"**.

In order to ensure a large visibility of this call for tenders, the ETUC will publish the tender specifications on its website (<http://www.etuc.org/call-for-tender>) on Thursday 21 December 2017 and keep the call open for 35 days (**deadline for submission of bids: 26th January 2018**).

I. Background

Reconciliation of work, family and private life has been a key policy for the ETUC for many years. It is included in the general Action programme adopted at the Paris Congress and in the Gender Equality Action programme covering the period 2016 – 2019 where work-life balance it is listed among ETUC's five priorities of actions.

Several EU legal provisions and policy address issues related to gender equality in the labour market and promoting work-life balance, the European Semester of policy coordination, EU funding and policy guidance.

In April 2017, the European Commission published a long-awaited proposal to modernise the existing legal on work-life balance. In the Communication accompanying the draft Directive social dialogue is said to play a key role "in ensuring that this initiative is successfully developed and implemented".

Work-life balance also features as one of the items often addressed within the cross-industry European Social Dialogue. ETUC, together the cross-industry employers' organizations (BUSINESSEUROPE, UEAPME and CEEP) have in fact concluded:

- the Framework Agreement on parental leave and implemented at Union level by Council Directive 2010/18/EU77;
- the Framework Agreement on part-time work - implemented by Directive 97/81/EC78;
- the Framework of actions on gender equality (2005);
- A Toolkit for gender equality in practice (2014).

The EU social partners at cross-industry level also included gender equality and work-life balance among the priorities for their current work programme 2015-2017.

At the national level, in many Member States, besides legislative measures targeted towards the facilitation work-life balance, collective bargaining plays an important role as a regulatory

instrument.

However, according to research, it appears that there is not systemised information on collective bargaining agreements dealing with work-life balance in the EU27. Very few studies and statistics exist at both comparative and/or national level and **this project aims at improving shared knowledge on how collective agreements are used to promote the work-life-balance of working families and caregivers, also with a view to establish what role they do already play or they could have in the future.**

The ETUC would like to gather together good practices that have been successful in promoting work-life balance through collective bargaining so as to be able to assess progress or lack of progress, focusing in more detail on collective bargaining bodies and negotiating structures at all levels in trade union organisations, both quantitative as qualitative (i.e. in terms of figures and in terms of identifying factors for success or failure). We would also like to mirror the collected good practices with the new initiative of the European Commission on work-life balance and to assess whether, and if so how, the economic crisis has impacted on trade union strategies regarding collective bargaining and reconciliation policies. This would enable us to track developments in our member organisations, and put forward proposals and guidelines for achieving better results.

We also intend facilitate an exchange of trade unions' good practices to foster negotiating policies and practices that include gender equality in all its dimensions in collective bargaining and social dialogue. This will contribute to the important debate on how trade unions can improve the implementation of the principle of gender mainstreaming, understanding the positive effects which this may have not only for women but also for men, and the economy and society at large.

Main activities

The area of investigation would cover two strands:

1. Collection, analysis and assessment of **trade unions' good practices** aimed at addressing work-life balance policies and measures;
2. Collection, analysis and assessment of practices to address work-life balance gap **in the social dialogue at all levels**, notably in collective bargaining at sectoral and company level.

As with respect to work-life balance elements, the following issues will be covered by the investigation (but not limited to):

- Family related leave arrangements such as parental, paternity and carers' leave (this would include: gender-balanced uptake of family leaves; increased scope and payment of family related leaves' beneficiaries; etc.);
- Flexible working arrangements & working time (e.g. telework, flexible schedule respecting family needs, reduced working time, short absences from work, etc.);
- Provision of childcare (e.g. company creches; company's benefits to employees' children creches);
- Transition between leaves and employment (e.g. provision of breastfeeding facilities at the workplace);
- Negotiated initiatives such as labels and certifications for companies with proven and longstanding of records work-life balance practices;
- Crediting of family-related leave periods in the pension system.

The following sectors will be covered by the project action (in close association with the European Trade Union Federations representing them): Food, agriculture and tourism; Transport; Health and Social Services; Local and Regional Government; National and European Administration; Utilities; Transports (Civil aviation, Logistics, Maritime Transport, Railways, Road transport; Urban Public Transport); Commerce ICTS; Finance; Cleaning & Security; Metal, textile and chemical; Education.

ETUC envisages putting in place the following main activities:

- To realise a **comparative study** and **10 national country cases** on social partners' practices tackling work-life balance issues in collective bargain with a focus on the above-mentioned sectors;
- To undertake **10 country visits** and European interviews with trade unions' experts, negotiators and stakeholders (employers, public authorities, universities, etc.);
- To produce a 5-minute **animated video** (with 1/2 practice identified on work-life balance agreements at company/sectoral level who work);
- To organise a **European Conference** to disseminate the preliminary results of the study and discuss it with a wider public (trade unionists but also public authorities, business organizations, civil society, researchers and academics, etc.);
- To organise a **European Brussels-based event** to share the final results of the project with EU policy stakeholders and EU27 participants.

People

People involved in the preparation and in the running of the project will include:

- From the **ETUC Secretariat** (4): 1 Confederal Secretary in charge of the Gender Equality dossier who is responsible for the project, 1 Adviser on gender affairs, 1 Project officer (part-time); 1 Accountant.
- A **Project Steering Committee** will be set up to monitor progress and help drive the work forward. The committee will be composed by:
 - 4 national representatives of the ETUC Women's Committee and the ETUC Collective Bargaining Committee (one Anglo-Saxon, one from a Southern EU country, one from Northern EU, one from CEEC countries),
 - 6 representatives of European Trade Union Federations (ETUFs) (who may also be appointed among ETUFs' national members)
 - 3 persons of the ETUC (the Confederal Secretary responsible for the dossier, one policy adviser and one project officer (part-time) 1 external expert (see below for the tasks description of the external expert).

This Committee will meet 4 times during the course of the project (3 separate meetings + one short Steering Committee meeting straight at the end of the final conference, to take advantage of the presence of all members of the steering group) and will work in English.

Calendar of activities

- The project will start on 1 January 2018. The expert(s) is (are) expected to start working in February 2018 and end in April 2019.

II. Tasks to be performed by the subcontractor(s)¹

The following tasks could be performed either by one single expert or by a (small) pool of junior experts managed by a senior one.

Description of tasks:

The subcontractor(s) should provide the following services for the applicant organisation:

- Provide expertise on the issues dealt with (industrial relations systems in the target countries (EU 28 + candidate countries), collective bargaining, social dialogue, gender equality issues and in particular work-life balance);
- Assist the ETUC project administrator in organising project steering committee meetings, national/EU level interviews the EU Conference and the Brussels-based event;
- Provide the necessary reporting of the activities and draft the project steering and conference meetings' reports and conclusions;
- Sit on the project Steering Committee, and work in close coordination with its members throughout the project;
- (*optional depending on methodology submitted*) Select and coordinate a team of junior experts under the supervision of the project Steering Committee.

For the **synthesis research report**, the subcontractor(s) will be required to:

- Propose a methodology to collect trade unions/social partners' good practices enhancing work-life balance.
- Carry out a desk research (by the expert and under supervision of the project steering committee) to gather existing practices addressing the topic of work-life balance, particularly regarding trade unions' role and collective bargaining (e.g. EIGE, Eurofound, EWL studies, etc.);
- Analyse trade unions' material to be collected via ETUC women's and collective bargaining committee and selection of preliminary good practices (under supervision of steering committee) to be further explored in face to face interviews;
- Conduct (or coordinate junior experts') face to face interviews in up to ten member states (2 to 3 days) and in Brussels (to EU stakeholders) with gender and collective bargaining experts from national and European trade union representatives (and where possible with employers' representatives) on trade unions' / social partners' strategies to enhance work-life balance. Interviews will be held in English where possible or in the national language (the assistance of an interpreter could be envisaged in some cases);
- Draft a background document for discussion at the EU Conference that will be further developed after the event and take into consideration discussions and conclusions.
- Finalise the synthesis research report for the EU-Brussels event.

¹ Important note: references to "expert" in the text are synonymous to "subcontractor"

For the **country visits**, the subcontractor(s) will be required to:

- Prepare a methodology to be discussed during the first Steering Committee meeting on how the country visits will be undertaken. The methodology will include a preliminary draft of questions, target countries and organizations, country reports structure as well as a timeframe for the country visits. It will be presented for discussion and approval during the first meeting of the Steering Committee;
- (*optional depending on methodology submitted*) Submit CVs for junior experts to assist her or him for the country visits, including methodology to be shared by the experts team;
- Work in close cooperation with the Steering Committee members throughout;
- Liaise with the project coordinator and national unions to organise the country visits;
- Analyse the interview responses and draft national country reports resuming the findings of country visits to be validated by ETUC members.
- Present the preliminary conclusions in the EU conference and in the synthesis research report.

For the **EU conference** the subcontractor(s) will be required to:

- Present and discuss the results of the desk research and country visits reports in the EU conference;
- Following the second Steering Committee meeting, coordinate with ETUC on the organisation of the EU Conference and the preparation of documents (including drafting of agenda, background papers, presentation materials etc.);
- Provide advice on the selection of guest speakers;
- Provide expertise and advice to the project Steering Committee and ETUC project coordinator/administrator. Expertise of the different national industrial relations and collective bargaining systems as well as gender equality with a specific knowledge of work-life balance is essential;
- Integrate the results of the discussions in the synthesis research report.
- Finalise the report (including country visits reports) following the Steering Committee meeting;
- Draft the conference report (main issues discussed and conclusions).

For the **European Brussels-based event** the subcontractor(s) will be required to:

- Attend the event and be available for possible chairing a round table.
- Draft the conference report (main issues discussed and conclusions).

For the **synthesis research report**, subcontractor(s) will be required to:

- Draft a synthesis research report (80 pages max) to be used as a discussion at the Brussels based event, integrating the results of the country visits and EU Conference event and present final recommendations;
- Submit a final draft of the report to the project administrator and Steering Committee members and at least 2 months before the European Brussels-based event in order to enable its translation and publication.

III. Expertise, experience and skills required

Sound expertise is required on the following issues:

- Expert knowledge of gender equality particularly regarding the issue of work-life balance as well as collective bargaining systems and industrial relations systems in Europe (Senior expert: + 10 years, Juniors: + 3);
- Ability to identify and integrate analyses of current labour market issues faced by employers' and trade unions' organisations in the EU countries;
- Sound understanding of the trade union movement and ETUC.

Sound experience is required in the following areas:

- Formulating and carrying out a tailored methodology in order to run interactive EU seminars and realise comparative EU research (Senior expert: + 10 years, Juniors: + 3);
- Running and animating national/EU seminars/conferences on two or more of the following themes: industrial relations/social dialogue/gender equality/work-life balance (Senior expert: + 10 years, Juniors: + 3);
- Successful track record of delivering in similar projects run over a 12+ month period, with EU institutions and/or European stakeholders (social partners, NGOs, etc.).

Skills required:

- Proven research and presentation skills (Senior expert: + 10 years, Juniors: + 3);
- Report drafting skills (in English);
- Ability to work within specified deadlines and to respect budgetary limits;
- Ability to work in a multicultural context and understanding of different industrial relations culture & traditions;
- Good administration and project management skills.

IV. Time schedule and reporting

The subcontractor(s) will be asked to work from **01/02/2018 to 30/04/2019**. The subcontractor will be responsible for submitting the deliverables foreseen in the project methodology within the above time frame. Specific deadlines for all deliverables will be agreed upon with the ETUC.

The subcontractor(s) will be asked to work for an estimated number of 65 days, of which:

- 35 days are dedicated to attendance of the steering meetings, the EU Conference + country visits;
- 10 days are considered necessary for the preparatory phase of the synthesis research report (preparation of first Steering Committee meeting, compilation of interviews and analysis of responses)
- 8 days are considered necessary to prepare materials for the EU Conference and to draft the synthesis research report to be presented and discussed at the Conference.
- 10 days are considered necessary for finalising the synthesis report following the Conference
- 2 days are considered necessary for the attendance of the EU Brussels-based event.

V. Payment

The total maximum budget available for expertise is as follows:

Contract with ETUC

Main activities and Meetings	
<ul style="list-style-type: none"> ➤ Desk research ➤ Steering Committee Meeting # 1 ➤ National / EU interviews ➤ Country visits ➤ Coordination of junior experts' team (<i>optional</i>) ➤ Steering Committee Meeting # 2 ➤ 1 EU Final Conference ➤ Steering Committee Meeting # 3 ➤ Final Synthesis Research Report ➤ 1 Brussels-based event ➤ Meetings reporting 	
Expertise	€
Expert 550€ x 65 days	35,750 € (including all taxes)

The subcontractor(s) will be remunerated in various instalments (advance and final payment). This amount does not include the travel and subsistence costs incurred for the study visits, Steering Committee meetings and other project meetings. These will be covered by ETUC on the basis of EU rules & thresholds.

VI. Selection criteria

Subcontractor(s)

The offers will be examined against the following criteria:

- Ability to propose a tailored methodology to prepare and realise a synthesis research report survey, country visits as well as support the organisation of a genuinely interactive EU Conference, preferably in line with the methodologies developed during recent projects undertaken by ETUC or European Trade Union Federations;
- Evidence of extensive experience in running and animating interactive EU seminars/conferences on one or more of the following themes: industrial relations/social dialogue/gender equality/work-life balance;
- Proven track record of ensuring the quality of written materials prepared, both in terms of content and format (i.e. previous publications) on one or more of the following themes: industrial relations/social dialogue/gender equality/work-life balance with a European perspective;
- Expert knowledge of industrial relations systems at EU level, collective bargaining, gender equality (particularly work-life balance);
- Ability to identify and integrate analyses of current labour market issues faced by governments, employers' and trade unions';
- Project management experience;
- Successful track record of similar project management experience is essential, involving +12-month duration, with EU institutions and/or European stakeholders (social partners, NGOs, etc.);
- Ability to conduct meetings and draft documents in English;
- Good administration skills;
- Respect of the budgetary and time constraints.

VII. Form, structure and content of the tender

Tenders must be written in either English or French. They must be signed by the tenderer or his duly authorised representative and perfectly legible so that there can be no doubt as to words and figures. Tenders must be clear and concise and assembled in a coherent fashion.

Since tenderers will be judged on the content of their written bids, they must make it clear that they are able to meet the requirements of the specifications.

All tenders must include at least two sections:

i) Technical proposal

The technical proposal must provide all the information needed for the purpose of awarding the contract, including:

- Specific information covering the technical and professional capacity as required in particular:
 - Description of relevant professional experience with emphasis on the specific fields covered by the invitation to tender;
 - Detailed curriculum vitae of key coordinator and/or possible other team members;
 - A selection of the main works and/or articles published by all the experts involved, in relation to the relevant subjects specified in this tender.
- Specific information covering each of the award criteria listed in point I and the work plan and tasks identified in point II.

ii) Financial proposal

Prices of the financial proposal must be quoted in euros, including the countries which are not in the euro-area. As far as the tenderers of those countries are concerned, they cannot change the amount of the bid because of the evolution of the exchange rate. The tenderers choose the exchange rate and assume all risks or opportunities relating to the rate fluctuation.

Prices must be fixed amounts and not include travel expenses and daily allowances for the interviews and meeting attendance (which will be covered by ETUC on the basis of EU rules & thresholds).

The maximum amount available for this contract is EUR 35,750 euros (including all taxes).

Prices shall be fixed and not subject to revision during the performance of the contract.

VIII. Award Criteria

The contract will be awarded to the tender offering the best value for money, taking into account the specific objectives, 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.

IX. Content and selection of the bids

This call for tenders will be published on the ETUC website on Thursday 21 December 2017. Offers must be sent within 35 days of the date of publication of this call for tenders on the ETUC website, by **26th January 2018**. Offers must be sent to ETUC, in both formats: electronic (by e-mail to amartin@etuc.org) and as a paper copy (see contact details below).

To ensure confidentiality, bidders must submit their offer in a double envelope. Both envelopes must be sealed and the inside envelope shall not only bear the name of the department for which it is intended (see below), but also the words "*Tender REBALANCE – not to be opened by the Mail Department*" (Appel d'offres *REBALANCE* – à ne pas ouvrir par le service du courrier).

A committee will be formed comprising three representatives of the ETUC Secretariat. 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.

All candidates must either deliver their bid by hand or send them by postal mail or courier delivery service to:

<p>ETUC Montserrat Mir Confederal Secretary International Trade Union House Boulevard du Roi Albert II, 5 B – 1210 Brussels</p>
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For bids sent by postal mail, the postmark will serve as proof of the date of dispatch.