

## CALL FOR TENDERS FOR SUBCONTRACTING EXPERTISE

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This is a call for a subcontractor to provide expertise as part of the implementation of the ETUC project "Safe at home, safe at work: trade union strategies to eradicate violence towards women". The validity of this call, and the subsequent completion of the tendering procedure, are subject to the award of the EC Grant for the above-mentioned project.

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>) and keep it online for 45 days.

### **I. Summary of the project and description of the objective(s)**

The European Trade Union Confederation (ETUC) has always been at the forefront of the combat against violence towards women. In 2011, the ETUC adopted its Strategy and Action Plan that states that "*economic dependence and sexist stereotypes contribute to inequality and violence*" and called for "*a new European legal instrument to combat violence against women*". Furthermore, the ETUC gender equality work programme adopted in 2012 sets down as its goal to encourage trade unions to address the link between domestic violence and work-place violence.

Between December 2013 and March 2014 the ETUC carried out the 8<sup>th</sup> of March Survey 2014<sup>1</sup> among its affiliated organisations to collect information on how they address the issue of violence against women, and to identify trends and shared concerns. The survey found out that:

- A large majority of unions in Europe address the issue of violence against women.
- Sexual and moral harassment are the two forms of violence mostly addressed by unions. Work-place violence is more tackled than domestic violence.
- Most unions address gender equality in collective bargaining agreements, but only a few have incorporated the specific issue of violence against women.
- Most confederations and all the ETUFs have carried out different sorts of bipartite initiatives (negotiations, recommendations, joint declarations, trainings, awareness raising events, etc.) with employers to address the issue of violence against women.
- Most unions take part in tripartite discussions at national level to address the issue of violence against women. The involvement can take different forms: participation in a governmental body, speaking during public consultations or hearings, taking part in national-led programmes / campaigns, etc. Unions can be involved in the different steps of the decision-making process: elaboration, promotion, monitoring and co-management.

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<sup>1</sup> Available at: <http://www.etuc.org/etuc-8th-march-survey-2014>

- A majority of ETUC members have adopted a political document addressing the issue of violence against women over the last years: a political statement, a resolution / motion, an action plan setting out a set of concrete actions to undertake.
- A significant number of unions have organised public events to discuss the issue of violence against women.
- A majority of unions have published studies, brochures, trade unions' manuals, awareness raising leaflets on the issue of violence against women.
- Nearly half of unions has taken part in demonstrations, parades, events aimed at raising awareness on violence against women.
- A large majority of unions cooperate with other confederations at national level to address the issue of violence against women. Many confederations involve their affiliate members at regional, local and/or sectoral level in gender-related projects.
- A substantial number of confederations and national federations cooperate with civil society organisations in the field of violence against women.

The findings have led the ETUC to pursue its work in this area in order to collect, analyse and assess successful practices (including collective bargaining agreements) aimed at:

- 1. Preventing, managing and eliminating violence at the workplace by looking at it with a gender dimension;**
- 2. Addressing the link between domestic violence and workplace violence.**

This work will enable the ETUC to develop a trade union strategy at European level and put forward guidelines aiming at eradicating violence against women. It will also contribute to further encourage trade unions' work to deal with preventive measures against violence and harassment towards women in the labour market.

As the ETUC 8th of March survey shows, relevant practices of trade union organisations addressing one or both of these two issues exist in most of EU countries and in various sectors.

#### ***A. Gender-based violence at work-place.***

Work-based violence has been a matter of strong concerns for trade unions for many years. Various measures have been promoted, including collective agreements, in order to create a safe work environment free from any sort of abusive behaviors.

Although violence and harassment may take place in all work-places, some sectors and professions are more exposed than others. Both men and women are at risk of work-place violence, but the amount and type of violence perpetrated against women is dramatic, particularly in certain sectors, occupations and jobs. It has been demonstrated that there is a gender dimension of work-place violence and that if this is addressed it can lead to adopt effective measures to prevent harassment and violence at work. In fact, differences between women and men's exposure to the risk of specific forms of work-place violence are reinforced by sex-segregated work-places – both horizontally (across operational layers of the organization or company) and vertically (up and down the hierarchy). While men predominate in better-paying and higher status jobs as well as hold more supervisory positions, the majority of women are concentrated in lower-paying and lower status jobs with little decision-making power.

Women form a significant percent-age of workers in occupations at higher risk to violence such as teachers, social and healthcare workers, and as shop and bank clerks. Women are particularly exposed to risks as migrant workers and domestic workers, as dependent family workers and within the informal economy. In terms of contractual relations, women are over-represented among workers holding atypical and precarious jobs, thus often lack both individual and collective bargaining power.

Data from the European Union demonstrates that sex and age are strong factors in experience of gender-based violence. Gender-related expectations about “male” and “female” behavior also influence levels of exposure to risk when men and women workers have the same job tasks in similar conditions – although variations are small, across countries men tend to experience slightly higher levels of physical violence while women experience marginally more verbal abuse and sexual assault.

Various ETUC affiliates have already addressed the issue of gender-based violence. Examples can be drawn in the education, health and transport sectors. At confederal and national level the issue of gender based violence has been tackled in Spain, Italy, Nordic Countries, etc.

At international level, a proposal is currently under discussion at the International Labour Organisation (ILO) on a Convention on gender-based violence. An ILO Convention could include provisions to prevent gender based violence at work as well as measures to protect and support workers affected by this kind of violence. The governments that would ratify such a Convention would be bound to put their laws in compliance with the international standards, which would induce a higher number of States with legislation on gender-based violence.

### ***B. Link between domestic violence and work-place.***

Domestic violence may happen behind closed doors but it has far reaching consequences and is known to have an impact on the working lives of those living with an abusive partner. The scale of the problem is huge. In the UK, for instance, in any one year, more than 20 per cent of employed women take time off work because of domestic abuse and two per cent lose their jobs as a direct result of the abuse.

Evidence shows that victims of domestic abuse have to take a several days off (sickness leave) work due to the abuse and that abused women arrive late for work and/or miss at least various days of work a month. Union reps are an important part of this picture. For those suffering abuse at home, the work-place can be a place of refuge and safety and a friendly union rep often is the first port of call when seeking help. Reps can support individual members in dealing with management and seeking time off work.

Unions also have a role in bargaining for better work-place policies on domestic violence. The ability to take time off work without facing disciplinary action or losing out on pay is crucial for survivors of domestic violence who are trying to flee an abusive relationship. Finding a new home, getting a place at a refuge, securing school places for kids, seeking legal advice, opening a new bank account and seeking medical help and counselling all take time. Good work-place policies on domestic violence often offer advances on pay to help survivors of domestic violence get through a period when they may have no access to cash or their own money is being withheld by an abusive partner. The first step in convincing employers that there’s a need for strong domestic violence policies is to show them the extent of the problem and the impact that it has on working lives.

Examples of trade unions work in this field are available in the UK, Spain but also at international level (Australia).

On the basis of these two background area of investigation, the ETUC project therefore aims at:

- Developing and improving trade union knowledge and instruments addressing the gender-based violence at work-place as well as the link between domestic violence and work-place;
- Include gender-based violence and/or the link between domestic violence and work-place in the negotiating agenda;
- Improve/promote gender mainstreaming into work organization as well as in collective bargaining and social dialogue;
- Sharing successful trade unions and/or social partners initiatives' on eliminating gender-based violence at work;
- Sharing innovative trade unions and/or social partners initiatives' addressing the link between domestic violence and work-place;
- Producing material to raise awareness among a wider audience about the need for a systematic inclusion of gender when dealing with violence at work-place level and extend it at sectoral and national level;
- Contributing to the objectives set by the European Commission Strategy on equality between women and men and identifying the priorities and actions for the EU;
- Contributing to the recommendations contained in the EP Resolution to fight violence against women;
- Providing a concrete contribution to the current ILO discussions to adopt an international labour standard to address gender based violence.

### **Main activities**

To meet the above objective we plan the following main activities:

- A **synthesis research report** will be completed on trade unions/social partners' practices tackling the two above described dimensions of workplace violence. The report will have to be translated from English into five languages (French, German, Spanish, Italian, Polish);
- **Interviews** will be conducted by an external expert in up to ten member states (2 to 3 days) and in Brussels (EU stakeholders) with gender experts from national and European trade union representatives, on trade union strategies to address violence against women in the workplace, and the link between domestic violence and workplace violence. Interviews will be held in English and in some cases with the assistance of an interpreter;
- 1,5 day **European Conference in Italy (Rome tbc) in 2015**. Presentation of comparative data and good practices based on the material collected by the external expert and validated by the project steering committee. The conference will bring together around 100 trade unionists but also public authorities, business organizations, civil society, researchers and academics, etc from all over EU-28 as well as acceding countries to the EU. There will be active interpretation in five languages: EN, FR, IT, DE, PL (this first selection will be confirmed according to the needs of the registered participants) and passive interpretation in two (ES, SE).

## **People**

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

- From the **ETUC Secretariat** (4): 1 Confederal Secretary in charge of the Gender Equality dossier who is responsible for the project, 1 Policy advisor on gender affairs, 1 Secretary; and 1 Accounting assistant;
- A **Project Steering Committee** will be set up to monitor progress and help drive the work forward. The committee will be composed of
  - 1 member of the Presidium of the ETUC's Women's Committee;
  - 4 national representatives of the ETUC Women's Committee;
  - 2 representatives of European Trade Union Federations (ETUFs);
  - 2 members of the ETUC Secretariat;
  - 1 external expert.

This committee will meet up 3 times during the course of the project and work in English.

## **Calendar of activities**

- The project will start on 20 October 2014 and end in January 2016.
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## **II. Tasks to be performed by the subcontractor<sup>2</sup>**

### **Description of tasks**

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

- Provide expertise on the issues dealt with (industrial relations systems in the target countries (EU 27 + candidate countries), collective bargaining, social dialogue, gender equality issues and in particular gender-based violence);
- Assist the ETUC project administrator in organising project steering committee meetings, national/EU level interviews and the EU Conference;
- Provide the necessary reporting of the activities and draft the meeting documents and conclusions;
- Sit on the project Steering Committee, and work in close coordination with its members throughout the project.

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

- Propose a methodology to address trade unions/social partners' practices tackling the two above described dimensions of gender based violence.

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<sup>2</sup> Important note: references to "expert" in the text are synonymous to "subcontractor"

- Carry out a desk research (by the expert and under supervision of the project steering committee) to gather existing practices addressing the topic of violence against women, particularly regarding trade unions' role and collective bargaining (e.g. FRA survey, EU SPs Framework Agreement on Harassment and Violence implementation reports; EIGE, Eurofound, EWL studies, etc.);
- Analyse trade unions' material collected in the context of the ETUC 8th of March survey 2014 and selection (under supervision of steering committee) of preliminary good practices to be further explored in face to face interviews;
- Conduct face to face interviews in up to ten member states (2 to 3 days) and in Brussels (to EU stakeholders) with gender experts from national and European trade union representatives on trade unions' strategies to address violence against women at work-place/and link between domestic violence and work-place. Interviews will be held in English where possible or in the national language (the assistance of an interpreter could be envisaged in some cases);

For the **interviews**, the subcontractor will be required to:

- Prepare a preliminary draft of questions to be addressed to target people and to be discussed during the first Steering Committee meeting, finalise the draft following the meeting and present it for final approval by the Steering Committee;
- Work in close cooperation with the Steering Committee members throughout;
- Liaise with the project coordinator and national unions to organise country visits;
- Analyse the interview responses and present the main conclusions in the final conference and in the synthesis research report.

For the **EU conference** the subcontractor will be required to:

- 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;
- Present and discuss the results of the desk research and interviews in the EU conference;
- Following the second Steering Committee meeting, coordinate with ETUC on the organisation of the Final Conference and the preparation of documents (including drafting of agenda, background papers, presentation materials etc.);
- Coordinate with the Steering Committee 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 gender based violence is essential;
- Integrate the results of the discussions in the synthesis research report;

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

- Draft a synthesis research report (80 pages max) to be used as a discussion at the Final Conference, integrating the results of the interviews and present initial recommendations;
- Following the Conference, integrate a summary of the conference and the main conclusions;
- Present a consolidated draft of the report in line with the methodology defined, at the 3<sup>rd</sup> Steering Committee meeting;
- Finalise the report following the Steering Committee meeting.



### **III. Expertise , experience and skills required**

Sound expertise is required on the following issues:

- Expert knowledge of gender equality particularly regarding the gender based violence as well as industrial relations systems;
- Ability to identify and integrate analyses of current labour market issues faced by employers' and trade unions' organisations in the EU countries;
- Good 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;
- Running and animating national/EU seminars/conferences on two or more of the following themes: industrial relations/social dialogue/gender equality/gender based violence;
- 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;
- 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 will be asked to work from **01/11/2014 to 01/01/2016**. The subcontractor will be responsible for remitting the deliverables foreseen in the project methodology within the above time frame.

The subcontractor will be asked to work 65 days, of which:

- 28 days are dedicated to attendance of the steering meetings and the EU Conference + interviews of relevant stakeholders;
- 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)
- 4 days are considered necessary for the preparation of the second Steering Committee meeting;
- 10 days are considered necessary to prepare materials for the Final Conference and to draft the synthesis research report to be presented and discussed at the Conference.
- 13 days are considered necessary for finalising the synthesis report following the Conference.

## **V. Payment**

The total maximum budget available for expertise is as follows:

<b>Contract with ETUC</b>	
<b>Main activities and Meetings</b>	
<ul style="list-style-type: none"> <li>➤ Desk research</li> <li>➤ Steering Committee Meeting # 1</li> <li>➤ National / EU interviews</li> <li>➤ Steering Committee Meeting # 2</li> <li>➤ 1 EU Final Conference</li> <li>➤ Steering Committee Meeting # 3</li> <li>➤ Final Synthesis Research Report</li> </ul>	
<b>Expertise</b>	<b>€</b>
Expert 550€ x 65 days	<b>35,750 €</b>

The subcontractor will be remunerated in various instalments (advance and final payment).

## **VI. Selection criteria**

### **Subcontractor**

The offers will be examined against the following criteria:

- Ability to propose a tailored methodology to prepare and realise a synthesis research report survey 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/gender based violence;
- 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/gender based violence with a European perspective;
- Expert knowledge of industrial relations systems at EU level, collective bargaining, gender equality (particularly gender based violence);
- 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.

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**

Offers must be received within 45 days of the date of publication of this call for tender on the ETUC website, by **3rd of October 2014**. Offers must be sent to ETUC (see contact address 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 – not to be opened by the Mail Department*" (Appel d'offres – à ne pas ouvrir par le service du courrier). If self-adhesive envelopes are used, they must be sealed with adhesive tape crossed by the signature of the sender.

A committee will be formed comprising three representatives of the 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.

The contracting authorities will then make their decision.

All candidates must either deliver their bid by hand or submit them by registered letter to:

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