

# Call for tenders for subcontracting an expert to produce a study on the role of selected international and European standards in shaping the world of work in the European service sector

This is a call for a subcontractor to provide expertise as part of the implementation of the “ETUC STAND” project Work Programme 2019.

The ETUC will publish the call on its website, on Thursday, 7 February 2019, and keep it online for 21 calendar days (deadline for submission of bids: Thursday, 28 February 2019).

## 1. Background information on the project

The European Trade Union Confederation launched the ETUC STAND project, which is aimed at sustaining and reinforcing trade union representation and effective participation in European standardisation. The project runs since 2015 with the financial support of the European Commission and the European Free Trade Association (EFTA).

There is evidence that working conditions are among the major societal challenges that standards can help to address, under the precondition that trade unions are able to achieve appropriate representation and effective participation in the European standardisation organisations. In this context, the ETUC standardisation project is aimed at strengthening our voice in standardisation to ensure standards promote high-quality working conditions and do not encroach upon the autonomy of social partners.

Moreover, the ETUC, recognizing that many of the areas subject to standardisation are political by nature, strongly insists on the respect of collective bargaining and collective agreements that may potentially be challenged by the development of standards.

While the benefits of trade unions’ involvement in the development of product standards (e.g. machinery, individual protective equipment, ergonomics, etc.) are widely acknowledged, ETUC members and affiliates occasionally question the relevance and expected benefits of the development of services standards.

Market players can also opt for alternatives to service standards. When no service standards are available or when no service standards will be elaborated, labels are a preferred substitute, next to industry consortia (setting their own standards). This is detrimental to the trade union movement, as it has no influence over labelling bodies, certification organisations and industry consortia. Within the European trade union movement, services standards are sometimes perceived as potentially threatening existing regulatory framework on work (e.g. social dialogue and collective bargaining, labour laws).

These uncertainties are ultimately detrimental to the active participation of trade unions in the development of services standards in specific sectors at national and European level. Therefore, the ETUC Secretariat wishes to conduct a study on the role of selected international and European standards in shaping the world of work in the European service sector.

## 2. Tasks to be performed by the subcontractor

By conducting a study focusing on the role of standards for workers in the service sector, the ETUC STAND's objectives are:

- To support and foster an active and informed participation of trade unions in the development of services standards at national, European and international level.
- To gather in-depth knowledge about the relationships and interplay between voluntary consensus standards in the European service sector and social dialogue, collective bargaining and agreements, working conditions, and labour laws.
- To understand the impact of international and European standards on working conditions and social dialogue in selected service sectors.

The subcontractor will conduct an analysis of the impact of standards in the service sectors. The ETUC envisages to have an analysis of two to five relevant European and international standards. These standards have to be well-implemented for at least 2 years, hence have an impact on the market. The selection of the standards, sectors and the countries will take place in agreement with the ETUC Secretariat.

Note: Annex A lists the field of activities in which the ETUC is currently actively contributing to the standardisation activities.

The analysis shall use maximum variation sampling. This means selecting a small number of units or cases that maximize the diversity relevant to the research question (e.g. countries with either high or low values on social dialogue structures and processes AND topics with either high or low value regarding trade unions' acceptance).

Further, the subcontractor will support the outreach and communication activities carried out by the ETUC Secretariat to disseminate and valorise the corresponding results. The subcontractor will have to provide the following deliverables:

- Publicly available study (target: 1);
- Text for a public leaflet summarising the main findings (target: 1);

The subcontractor should further participate in two events to disseminate the results, one of which is the ETUC PC "Standardisation" meeting. The subcontractor will present then the results on behalf of the ETUC STAND project. The events will be communicated by the ETUC Secretariat well in advance.

The study research should be carried out in close collaboration with ETUI, the European Trade Union Institute.

### 3. Expertise, experience and skills required

Sound expertise is required on the following issues:

- Knowledge of the wider services industry, good understanding of workers issues, in the framework of services
- ISO and CEN policy regarding standardisation in the field of services
- Profound knowledge on the interaction between legislation and standards
- Good knowledge of the standardisation processes of National Standardisation bodies, CEN and ISO.
- Good understanding of trade union working
- Standardisation policy of the European Commission, the “Better regulation” policy and “REFIT” activities
- European Commission policy on the use of services standards, also with view to create a single market for services
- Basic knowledge of the interactions between on the one hand, standardisation bodies, and on the one hand consortia, labelling organisations, de-facto standards, etc.

Skills required:

- Academic Degree
- Proven research and presentation skills (in English);
- Proven skills in drafting study reports;
- 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 and traditions;
- Good administration and project management skills;
- minimum 2 years of active participation in service standards-writing activities at European (CEN) or international level (ISO).

### 4. Time schedule and reporting

The subcontractor will be asked to perform the above-mentioned tasks by 15 November 2019. The draft study report as well as the draft leaflet text should be submitted to the ETUC Secretariat by 20 October.

Please note that the exact dates of the above-mentioned events may be subject to slight changes and will be decided upon by the steering committee.

### 5. Payment

The total maximum budget available for the fees of the subcontractor is **20 000 € (VAT and all taxes included)** as follows:

The subcontractor will be remunerated in various instalments (advance and final payment). This amount covers the fees but does not include the travel and subsistence costs incurred for study visits and presentation of the results at two events. These will be covered by ETUC on

the basis of EU rules and thresholds.

## 6. Selection criteria

The selection criteria are:

- Verifiable expertise, experience and skills, as required and described in part 3 of this call;
- Proven track record of ensuring the quality of written materials produced, both in terms of content and format (i.e. previous publications), in the relevant subjects specified in this call for tenders;
- Price not exceeding the amount stated below;
- Previous research/work undertaken in the field of standardisation and its impact on trade unions and working conditions.

## 7. Form, structure and content of the tender

Tenders must be written in English. They must be signed by the tenderer or his duly authorised representative and be 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 the key coordinator and other team members, when applicable;
  - 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 concerning the proposed methodology for delivering the tasks listed in part 2 of this call.

ii) Financial proposal

Prices of the financial proposal must be quoted in euros, including if the sub-contractor is based in a country which is 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 shall not include travel expenses for the attendance to the Steering Committee meetings and other project events which will be covered by ETUC on the basis of EU rules & thresholds.

The maximum amount available for this contract is EUR 20 000 (VAT and all taxes included).

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

## 8. 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.

## 9. Content and selection of the bids

**This call for tenders will be published on the ETUC website on Thursday, 7 February 2019, and will be kept online for 21 calendar days. Offers must be sent at the latest on Thursday, 28 February 2019.** Offers must be sent to ETUC, in both formats: electronic (by e-mail to [amartin@etuc.org](mailto:amartin@etuc.org)) and as a paper copy (see contact details below).

Concerning the paper copy, 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 ETUC STAND Project – not to be opened by the Mail Department" (Appel d'offres – à ne pas ouvrir par le service du courrier).

A committee will be formed comprising of 3 representatives of the ETUC. 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;
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.

Candidates must send their bid electronically – to the following e-mail address: [amartin@etuc.org](mailto:amartin@etuc.org) – as well as submitting a paper copy of their bid, either delivered by hand or by registered mail or special courier service to:

**ETUC**

Peter SCHERRER

Confederal Secretary

International Trade Union House

Boulevard du Roi Albert II, 5

B – 1210 Brussels

BELGIUM

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

ANNEX A

NOTE: this list is non-exhaustive.

<b>Field and Technical Committees</b>
Maintenance services (CEN/TC 319)
Facility Management services (CEN/TC 348)
Cabin air quality on civil aircraft (CEN/TC 436)
Private Security Services (CEN/TC 439)
Horizontal standards for the provision of services (CEN/TC 447)
Quality of care for elderly people (CEN/TC 449)
Minimum requirements of patient involvement in person-centred care (CEN/TC 450)
EC Multi-Stakeholder Platform on ICT
Energy-related products - Material Efficiency Aspects for Ecodesign (CEN-CLC/JTC 10)
European Quality Framework for Internships (CEN/WS 95)
Human Resources Management (ISO/TC 260)
Occupational Health & Safety (ISO/TC 283)
Whistleblowing (ISO/TC 309 WG 3)
Ageing Societies (ISO/TC 314)