

# Call for tenders to produce a study on exploring the possibility of developing a European standard on cleaning services, based on the experience of the INSTA 800 standard in the Nordic countries.

This call for a subcontractor to provide expertise is published as part of the implementation of the “ETUC STAND” project Work Programme 2020.

The ETUC will make the call for tender publicly available on its website, as of Wednesday 14 October 2020, and for 21 calendar days (deadline for submission of bids: Wednesday 04 November 2020).

## 1. Introduction and background information on the project

The commercial facilities services industry is a growing sector, as more and more activities previously carried out in-house by companies or public authorities themselves, are now outsourced to specialised contractors. These activities include the maintenance of buildings, security services, catering, and cleaning services.

There is growing evidence that the working conditions in the facilities services sector are major societal challenges that standards can help to address in part, under the precondition that trade unions are able to achieve appropriate representation and effective participation in the European standardisation process.

In this context, the ETUC standardisation project<sup>1</sup> (from now on ETUC STAND), which aims at strengthening the trade union voice in standardisation, has been participating in the standards setting activities relating to the facilities services sector, to ensure that standards promote high-quality working conditions and do not encroach upon the autonomy of social partners. Moreover, the ETUC STAND strongly insists on the respect of collective bargaining and collective agreements that may potentially be challenged by the development of standards.

The ETUC STAND project is executed with the cooperation of its national affiliates as well as European Trade Union Federations (ETUFs). In the field of services and in particular facility service management and cleaning services, UNIEuropa is the main stakeholder and contributor.

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<sup>1</sup> 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).

## 2. Standards in the service sector

### 2.1. Standards to underpin European Directives

Over the years, facility management and cleaning services have been considered as services thereby falling under the [Directive on services in the internal market \(2006/123/EC\)](#). The latter foresees the use of standards to define the service provision<sup>2</sup>. But service standards are sometimes perceived within the European trade union movement, as a potential threat to existing regulatory framework on work with the risk of undermining or interfering with social dialogue and collective bargaining, and labour laws.

It is worth noting that although standards can address services, they are not the only other option as market players can opt for alternatives. Indeed when service standards are not available and are not expected to be developed in the future, labels are often a preferred substitute, next to industry consortia (setting their own standards). This is detrimental to the trade union movement, who has no influence over labelling bodies, certification organisations or industry consortia.

Moreover, standards are an essential element in the procurement process. The European Directive on public procurement ([2004/18/EC](#)) explicitly foresees the use/reference of standards for defining the technical specifications (of, for example, cleaning services)<sup>3</sup>. As such, a standard that takes into account social issues, can be a means to help trade unions (and in general the social partners) to include, and measure, quality and social aspects in their procurement process.

Whereas the quality of cleaning services is determined by technical merit and professional ability, social aspects include the respect for collective agreements and good employment conditions. Both the quality and social aspects represent two sides of the same coin. If these are not taken into account, unfair competition between companies and social dumping of employees are likely to be the rule. Cleaning is a highly labour-intensive service where labour accounts for around 85% of costs. As a consequence, the social partners strongly underline that awarding contracts purely on price or cost will lead automatically to quality shortcomings and unlawful practices.

### 2.2. Standards for cleaning service in Europe

The “INSTA 800 standard” was developed specifically in the field of cleaning services. Over the years, it has been adopted as a national standard in seven Nordic countries (i.e. NO, SE, FI, DK, EE, LT and IS).

Next to the INSTA 800 standard, the Austrian national standard D 2050:2017 “*Cleaning services – Performances in square meter in the field of cleaning of monuments, facades and buildings*” uses a different concept as it addresses the square meters, rather than the cleaning quality. The Austrian standard is also fully integrated in the 2017 Austrian framework collective agreement on cleaning services.

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<sup>2</sup> This is clear in its recital 102 and article 26

<sup>3</sup> This is clear in article 42 of the directive and throughout the directive.

In Belgium, the FGTB trade union is advocating to have a Belgian or European standard on cleaning services, as one of the ways to stop the “race to the bottom” in the cleaning industry. The FGTB main source of inspiration is the Austrian standard D 2050.

### **2.3. Standards in the tendering for cleaning service**

The social partners, UNIEuropa and ECFI, elaborated the “selecting best value” guide for the cleaning services. But the Guide falls short in providing details on the “technical criteria”, which are the underpinning “nuts and bolts” in a tendering process. The website of the Guide is available [here](#). To elaborate the technical criteria in preparation for the calls for tender, larger tendering companies and organisations turn to consultants specialised in cleaning services. These consultants make use of a variety of tools, ranging from INSTA 800 standards, standard time measurements programmes (e.g. “Calculatieboekje Schoonmaak), to the national Austrian standards D 2050.

At the same time, large cleaning services multinationals use IT programmes to calculate the cost price of a cleaning programme. The algorithms supporting these IT programmes are proprietary to the companies and are not public.

### **2.4. Fine tuning the INSTA 800 standard**

In September 2019, a new Commission funded project (Erasmus+) was set up to elaborate proposals for the fine tuning of the cleaning services standard (INSTA 800). Details of this Erasmus+ project are [here](#). Trade unions are not a partner in this project, albeit one of the main stakeholders, as cleaning staff have to execute the cleaning programmes defined in the INSTA 800 standard.

## **3. Objective of the study**

The technical research would look into the possibility of developing a European standard with the INSTA 800 standard as a basis, that could be used namely in procurement:

The study would first explore cleaning services in Europe from the trade union perspective, and the different standards, if any, applied at national level (this is the minor part of the study).

Then, it would analyse the impact/consequences/results of the INSTA 800 standard on the working conditions, wellbeing and workload of workers in the cleaning sector in the Nordic countries. The study would analyse the improvements and limitations of the cleaning work of the INSTA 800 standard.

Finally drawing from the analysis, the study would investigate the feasibility of developing a European standard, based on INSTA 800. It would provide recommendations on how a European standard might improve the working conditions in the cleaning service sector in Europe, as well as what elements from the standard could potentially be adopted in ECFI and UNI Europa’s Best Value Guide and UNI’s work on public procurement.

## 4. Tasks to be performed by the subcontractor

The study research should be carried out in close collaboration with UNIEuropa, the European Services Workers Union.

By conducting a study on the role of standards for workers in the cleaning sector, with a focus on INSTA 800, there is the need to investigate, amongst others, the following topics:

- Explore cleaning services in Europe today from the trade union perspective. What are the workers' conditions in the cleaning service sector? What country is applying what standards? Are there standards everywhere? Is there a 'race to the bottom'? (this is the minor part of the study)
- Analyse the impact/consequences/results of the INSTA 800 standard on the working conditions, wellbeing and workload of workers in the cleaning sector in the Nordic countries (this is the major part of the study)
  - Does INSTA 800 solve the issue around wellbeing of workers (e.g. workloads)?
  - If not, how can the workers' wellbeing (e.g. workload) be addressed in the INSTA 800 standard (make – detailed - proposals)?
  - Is the 'objective measurement of cleanliness' or cleaning by eye useful to unions and workers?
  - How is it being applied in the cleaning industry (larger companies, smaller companies, what kind of clients)?
- Is a roll-out of the INSTA 800 – as a European Standard – beneficial to the European cleaning sector:
  - for its workers – to improve well-being at work?
  - for the cleaning companies – to establish an equal playing level field between cleaning companies?

### 4.1. Deliverables:

The sub-contractor will have to provide the following deliverables:

- A draft and a final version of the study report
- A short and easy to understand summary of the report to be used in communication material, meetings and events:

Before the start of the study, there will be a kick-off meeting organised (either a face to face or virtual meeting) to discuss the different steps of the study;

Halfway through the execution of the study, a second meeting is recommended to go over the preliminary results and the presentation of the interim report by the contractor to the ETUC STAND secretariat (and UNIEuropa);

To close the study and with the delivery of the draft final report of the study, a meeting shall take place to go over the comments made by the ETUC STAND secretariat;

The subcontractor is also expected to participate in some events to disseminate the results of the study. The subcontractor will present the results on behalf of the ETUC STAND project and UNIEuropa. The dates of these events will be communicated by the ETUC STAND secretariat and/or UNIEuropa well in advance.

## 5. Expertise, experience and skills required

Sound expertise is required on the following issues:

- In depth knowledge of the trade union movement in Europe;
- Proven experience of work/project/collaboration with the trade union movement, with a focus on the cleaning sector
- Knowledge of the cleaning services industry in Europe, good understanding of workers issues in the framework of cleaning services;
- Knowledge of the interaction between legislation and standards;
- Profound knowledge of cleaning services programmes/quality systems/ measurement programmes, etc.

Skills required:

- Academic degree or equivalent through sector experience and knowledge;
- (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 cleaning service programmes/standards-writing activities, at national, European (CEN) or international level (ISO).

## 6. Time schedule and reporting

The subcontractor will be asked to perform the above-mentioned tasks by 31<sup>st</sup> December 2020. The draft study report as well as the draft leaflet text should be submitted to the UNIEuropa and the ETUC secretariat by 10<sup>st</sup> December 2020.

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.

## 7. Payment

The total maximum budget available for the fees of the subcontractor is **10 000 € (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. Prices shall be fixed and not subject to revision during the performance of the contract.

## 8. Selection criteria

The selection criteria are:

- Verifiable expertise, experience and skills, as required and described in part 4 of this call;
- Proven track record of ensuring the quality of the tasks, 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 cleaning services and its impact on trade unions and working conditions.

## 9. 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 made 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 and thresholds.

## 10. 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.

## 11. Content and selection of the bids

**This call for tenders will be published on the ETUC website on 14<sup>th</sup> October 2020 and will be kept online for 21 calendar days. Offers must be sent at the latest on 4<sup>th</sup> November 2020.** Offers must be sent to ETUC, in electronic format (by e-mail to [amartin@etuc.org](mailto:amartin@etuc.org)).

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.