

Call for tenders for subcontracting an expert in the framework of the ETUC project “Trade Unions against Discrimination”

This is a call for a subcontractor to provide expertise in the framework of the implementation of the ETUC project “Trade Unions against Discrimination”.

The ETUC will publish the call on its website on 30 August 2023. The **deadline for submission of bids is 25 September 2023 at noon (12:00)**.

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1. Expert's publication "Fighting discriminations at the workplace" in the framework of the project "Trade Unions against Discrimination"

1.1 Summary and objectives of the project

The main objectives of the project are:

1) *Raise awareness of the intersectional discrimination* and contribute to the shift of understanding of discrimination from a largely individual to a more structural level

- Instead of relying solely on single-axis frameworks, which focus on one dimension of discrimination at a time (e.g. gender or ethnicity or disability), an intersectional approach caters to the multidimensionality of people's experiences and identities. For instance, Muslim women wearing the hijab, women with disabilities, LGBTQI+ refugees can experience discrimination in qualitatively different ways as their male, white and non-disabled counterparts. Such variations in how discrimination manifests for different people based on the combination of various identities is not only (mostly) not captured by the available statistical data, but also rarely addressed by anti-discrimination legislation in EU member states.

2) *Enhance the Trade Union capacity to detect and combat and prevent discrimination at the workplace*

- Trade unions are important non-discrimination actors that make an essential contribution in this area. They typically have well-organised structures and TU representatives in the workplace can draw on the expertise of their sectoral and national officers and offices, giving them the potential to effect wider societal change through their non-discrimination actions. However, there are many different approaches across Europe that are highly dependent on resources. Through this project ETUC wants to contribute to sharing of the best practices and to strengthening the capacity to develop concrete strategies on the workplace/company-level.

3) *Building synergies among Trade Unions and Civil Society Organisations (CSOs)* to mainstream equality at the workplace and to strengthen the workers perspective in national and EU policymaking.

- Trade union membership, social dialogue and workers' information, consultation & participation rights are essential tools for democracy in the workplace and play a key role in building democratic and inclusive societies. While civil society and academia are championing the intersectional approach to discrimination, there is a worrying trend of restrictive measures in a number of EU Member States negatively affecting civic space and the ability of civil society actors to carry out their legitimate tasks. This project will address Trade Unions' need to strengthen strategic collaborations to design and carry out their nondiscrimination practices. These partnerships help to increase the unions' lobbying power, as well as providing a forum for discussion and exchange of good practices.

1.2 Context of the project

Intersectionality has gained much attention in Europe over the past ten years, both in academic spheres and increasingly in the policy field. The concept gives policymakers, lawyers and sociologists the opportunity to not only approach discrimination and social inequalities from a systemic and structural perspective, but also to capture discrimination patterns that tend to be

invisibilised or overlooked in the current legal and policy frameworks for anti-discrimination. Some workers experience discrimination for more than one reason. A combination of different characteristics can create yet another layer of inequality, increasing even further their risk of unfair treatment on the labour market. Also, those who experience multiple and intersecting forms of inequalities may face more barriers to getting support.

Over the past 2 years, the COVID-19 pandemic has thrown into sharp relief the need to urgently uproot and dismantle systemic inequalities and systems of oppression that have persisted for far too long within our societies and in the world of work.

The evidence shows that discrimination continues to be an issue in Europe despite longstanding legal and policy efforts to combat it. The numerous studies and daily practice show that trade unions (TU) play a fundamental role in supporting the transition towards a more diverse society and that collective bargaining and social dialogue can play a crucial role in tackling discriminations on the workplace.

The project will contribute directly to the call objectives by:

- Enabling cross borders exchange of best practice between workers and their representatives
- Promoting workers involvement in creation and/ or revision of inclusive company policies
- Building social partners capacity to detect, and prevent discrimination at the workplace
- Promoting transnational and regional cooperation
- Establishing new international and multi-stakeholders alliances

To achieve these objectives, the project foresees the following activities:

- *Steering committee meetings*

The steering committee will be set up and regularly meet online with exception of ad-hoc meetings at the fringe of the physical events.

- *Learning seminars*

A series of 5 workshops organised in different member states. Each workshop will focus on a specific theme (see the list below) and experts from TU organisations and from, civil society and relevant institutions will present their views on how to deal with the issues at stake.

The thematic focus of the 5 seminars will be as follow:

1) Ageism

Age is one of the first things we notice about other people. Ageism arises when age is used to categorize and divide people in ways that lead to harm, disadvantage and injustice and erode solidarity across generations. According to the WHO's Global report on Ageism , Ageism pervades many institutions and sectors of society, including those providing health and social care, the workplace.

2) LGTBQI+

The FRA's report "*A long way to go for LGBTI Equality*" recognises a positive contribution of social partners to the fight homophobia at the workplace, but it also recognizes that the number of people who felt discriminated at the workplace remains alarmingly high In Europe.

3) Racism

According to the findings of the ENAR's platform Equal@work Migrants and minorities face discrimination when they're applying for jobs. But even once they are in a job, migrants and minorities continue to face unequal treatment.

4) Sexism

The EIGE's Handbook on Sexism at work acknowledges that despite legal frameworks set

up across the EU to prevent discrimination and promote equality, women are still under represented in decision-making roles, left out of certain sectors of the economy, primarily responsible for unpaid care work, paid less than men and disproportionately subject to gender-based violence.

5) Disability

At their Annual Accessibility Summit, the European Disability forum brought to attention that even though EU Employment Equality Directive prohibits discrimination in employment and vocational training on the grounds of disability, the latest EU figures on the employment rates of persons with disabilities showed that on average, only 50.8% of persons with disabilities were in employment.

- Compendium of best practices

The online publication will collect the best practices presented during the learning seminars as well as recommendations to overcome the exposed challenges.

The publication will be composed of two parts with two different target groups

- a) Toolkit with strategies and steps that can be applied at the workplace to detect, tackle and prevent discrimination at the workplace
- b) Policy recommendations for decision-makers on national and EU level that will contribute to the implementation of “A Union of equality: EU anti-racism action plan 2020-25”

The compendium of best practices should serve the project’s objectives as follows:

- ✓ Promoting the best practices and collect the solutions effectively tackling intersectional discrimination on the national level
- ✓ Developing the policy recommendations targeting national and European level
- ✓ Developing strategies targeting company level
- ✓ Increasing capacity of trade union representatives to identify, tackle and prevent discrimination at the workplace

- Final dissemination event

Final event to present project outcomes to policy and decision makers.

2. Tasks to be performed by the subcontractor

Given the context outlined above, the subcontractor is required to:

- Draft a compendium of best practices (around 50 pages - in English - meaning that the document should be finalised in English and require no proofreading) which will include:
 - Policy overview (previously explored in the background papers to be produced by the expert for the 5 seminars learning points).
 - Existing strategies
 - Proposal for evidence based strategies
 - Evidence based policy recommendations
- Carry out 3 “country visits” (to interview stakeholders in the field) in order to feed the publication
- Participate to the 5 learning seminars by :

- reviewing existing policy initiatives regarding the intersectionality and preparing background paper for each seminar;
 - assisting to the seminars, taking note of the discussions, collecting the best practices and case studies and reaching out to participants of the learning seminars for clarifications if needed.
- Participate to the Steering Committee meetings by:
 - Updating the Steering Committee members on the drafting of the publication, collecting inputs and updating the compendium if necessary
 - Work in close coordination with the ETUC project's team throughout the project.

Publication

The publication has to be produced taking into consideration the aims of the project. For this, the subcontractor will work under the supervision and guidance of the ETUC project team and the project's Steering Committee.

3. Expertise, experience and skills required

The drafting of the publication requires sound and proven expertise in the following fields:

- Expertise on EU labour legislation, with a focus on the areas of anti-discrimination at the workplace
- Knowledge of relevant European-level policies and legislation on the areas of anti-discrimination at the workplace
- Experience in working on European level projects;
- Experience in working with trade unions at both European and national level.

Skills required:

- Proven ability to carry out in-depth research on EU issues and understanding links between European and national level;
- Proven research skills, including identifying stakeholders and conducting interviews and collecting good practices;
- High proficiency in English: ability to draft documents and make presentations in English;
- Ability to work within specified deadlines and to respect budgetary limits;
- Availability to participate to meetings of the Steering Committee (online meetings);
- Availability to travel across Europe (5 learning seminars + 3 country visits in 18 months)

To ensure a coherent policy approach, familiarity with ETUC demands, included in documents available on [this page](#).

4. Time schedule and reporting

The subcontractor will be asked to sign the contract in early October 2023. The 1st Steering Committee meeting is foreseen on Thursday 5 October 2023 (morning) and will take place

online. The preliminary findings of the report will have to be presented to the ETUC’s project team by April 2025 at the latest (before the last Steering Committee meeting). The final document should be ready at least 3 weeks before the Final Conference of the project foreseen at the end of May 2025. The rest of the working calendar will be submitted to ETUC according to an agreed timeline, to be discussed on the occasion of the first meeting between the ETUC’s project team and the subcontractor. The timeline of the project as attached (annex I) can serve as a basis to define the working calendar. Exchanges with the ETUC’s project team will be planned on a regular basis to ensure a smooth coordination.

5. Payment

The total maximum budget available for the fees of the subcontractor is as follows:

Contract with ETUC	
Main activities and Meetings	
<ul style="list-style-type: none"> • Drafting the publication in English • Participation in 5 learning seminars and the 3 country visits - . Participation in the project’s steering committee meetings to present the draft publication and update, if necessary the content of the report. • Liaising with the ETUC project team and the Steering Committee when necessary 	
Total budget for the Expertise	36 000 € (VAT and all taxes included¹)

The subcontractor will be remunerated in various instalments (advance and final payment). This amount covers all fees but does not include the travel and subsistence costs for possible physical meetings (which will be borne by ETUC according to its travel policy and on a case-by-case basis).

The studies will be duly and clearly accredited to the authors. Ownership of the results and of the written outputs (including the study produced by the sub-contractor) shall be vested in the ETUC, which shall have the right of first publication. The subcontractor may use the results and the written outputs after their publication by the ETUC, quoting the ETUC as contractor and the ETUC’s project team.

6. Selection criteria

Bids will be evaluated and selected against the following criteria:

- Quality of the technical proposal submitted by the bidder;
- Verifiable expertise, experience and skills (including CV) 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) and in the relevant subjects specified in this call for tenders;
- Financial proposal within the prescribed budget.

¹ Unless the subcontractor is exempt from VAT, VAT is always included in the total budget, also when reverse charge applies and VAT is borne by ETUC.

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 key coordinator and of the 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 concerning the proposed methodology for delivering the tasks listed in part 2 of this call for tenders.

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 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 36,000 (VAT and all taxes included²).

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.

² See footnote 1.

9. Content and selection of the bids

This call for tenders will be published on the ETUC website on 30 August 2023. Offers must be sent at the latest on 25 September 2023 at noon (12:00). Offers must be sent to ETUC, in electronic format (by e-mail to lmartin@etuc.org) and refer to the “ETUC TUaD project”.

A committee will be formed comprising three representatives of the ETUC Secretariat. The committee members will evaluate the tenders that have been deemed admissible. An evaluation report and classification of tenders 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;

The names of candidates put forward and justification of their choice in terms of the selection or award criteria.