



CALL FOR TENDERS

for subcontracting external expertise as part of a European Trade Union Confederation (ETUC) project:

Corporate Social Responsibility (CSR) **Trade union training on the renewed EU strategy for 2011-2014**

1. Background

Throughout the period 2012/2013, the ETUC ran a CSR project backed by the European Commission. The project highlighted the new CSR practices that have been rolled out by ETUC affiliates since 2006 and also resulted in the identification of trade union priorities for the years to come, particularly regarding the renewed EU strategy.

However, the final conference also demonstrated the urgent need to train trade unionists about a range of European and international tools, principles, instruments and regulations. The current project aims to meet the pressing demand expressed by members at the conference.

2. Schedule

Two training courses: February 2014 and March-April 2014 / 30 participants / Brussels / two days / interpretation into English, French, German and Italian.

The conference in May 2013 highlighted in particular the need and demand for training mainly geared towards trade union trainers, Works Council/information and consultation body coordinators and members at both national and European level and CSR officers within the organisations. This desire for training, which was clearly specified as one of the priorities for monitoring the 2012/2013 project, will centre on two aspects.

The *first* will focus on internationally recognised CSR principles, guidelines and tools (e.g. the ILO Tripartite Declaration of Principles on Multinational Enterprises and Social Policy, the OECD Guidelines, the UN Guiding Principles).

The *second* will address the Commission's new proposal to introduce non-financial reporting in companies with over 500 workers.



The ETUC believes that the two tools (which are also included in the renewed EU strategy 2011-2014) must be rolled out on a larger scale at the appropriate levels, as set out in the Commission's Action Programme. As such, it is crucial that European trade unions make these tools their own.

Furthermore, the two training courses could allow an overview of the progress of the work carried out by the European Commission (follow-up on the Communication), as well as exchanges on this subject between the ETUC member organisations and a debate with other stakeholders.

As such, the training courses could comprise two main sections:

- the presentation of introduction documents prepared by the expert; training in/discussions on the content (hopefully external representatives from the ILO, the ITUC, TILS and the Commission, among others, will attend);
- a final round-table discussion attended by various organisations and stakeholders.

Conference / June 2014 / 100 participants / Brussels / 1.5 days

After the two training courses, a follow-up conference will be organised in Brussels in June 2014, with interpretation in English, French, German, Polish and Italian. The expert will have added to the two basic documents used for training and discussions during the training courses, with a view to improving them for the conference and compiling a summary in the form of a practical toolkit primarily intended for trainers, (European) Works Council coordinators and members and CSR officers.

This Conference will focus on three key points:

- the follow-up of conclusions drawn from the two training courses;
- the presentation of ETUC member organisations' recent practices and priorities;
- an update of the trade union contribution to the Commission's Action Programme.

Follow-up on the conclusions drawn at the Conference:

The ETUC has already made its position on CSR clear with a resolution it passed in December 2011. This position has been added to using the findings of the project for 2012/2013, in particular the exchanges that took place during the conference in May 2013 and the resulting final study.

At the same time as the two training courses, it is also very important to assess the follow-up by the ETUC member organisations to the conclusions of the May 2013 conference and the resulting internal action plan. To this end, the expert will get back in touch with the national confederations and European trade federations affiliated to the ETUC.

Following discussions at the 2014 conference, this analysis will help to update the ETUC action plan.



3. Tasks to be performed by the contracting party

The contracting party will be in charge of performing the following tasks:

- Draw-up two preparatory documents for the training courses (20 pages each);
- conduct two training courses;
- produce the toolkit at the end of the training courses. This tool will be presented and approved at the final conference before being translated and widely disseminated among our affiliates and interested stakeholders. The 40-page toolkit will be written in English and French, and 100 copies will be printed and member organisations, particularly their trainers and their EWC coordinators, will be able to download it from the ETUC's website;
- help to prepare and moderate the final conference;
- follow-up among ETUC members with a view to updating the ETUC action plan on CSR.

The expert's work will be supervised by the Steering Committee, chaired by Patrick Itschert, Deputy General Secretary of the ETUC (who is also responsible for CSR, among other things).

The Steering Committee will set out the contents of the documents to be drafted and will validate the method for the process of collecting and processing information to be performed by the external expert.

4. Skills required

The contractor must prove that the (team of) expert(s) responsible for performing the above-mentioned tasks has:

- an excellent command of English and French (a third language would be a bonus);
- plenty of knowledge about the subject of the project, namely CSR;
- a background in conducting studies / research and providing training in the fields of industrial relations, social dialogue and, above all, CSR;
- been involved in European projects;
- experience in drafting documents disseminated to a mass audience;
- ability to adhere to a project's set deadlines;
- ability to work in a team.



5. Timetable and reports

The delivery of the tasks within this project is scheduled from October 2013 to September 2014.

The 2 working documents will be presented to the ETUC, for approval, before the 2 training seminars, and the “toolkit” will be presented to the ETUC, for approval, before the final conference due to take place in June 2014.

The Steering Committee will decide on the exact dates when the various reports and documents must be submitted.

6. Price

Payment conditions for the selected expert/consulting firm are regulated under the conditions of a contract with the European Commission. Consequently, the payment conditions are non-negotiable and do not constitute a selection criterion for the offer. The selected expert/consultancy company will be paid a basic fee of up to €39,000 (all taxes included) for the work performed.

7. Payment

Payment will be made in two instalments:

- the first instalment of 1/3 of the total amount upon signature of the contract;
- the remainder upon receipt of the full invoice once the Steering Committee has approved the content of the reports and final product (the “toolkit”).

8. Selection criteria

The contract will be awarded to the expert with the best quality/price ratio. The following criteria will be taken into account:

- experience, CV, evidence of previous work in the area relevant to the project;
- ability to work in a team;
- ability to work in English and French;
- ability to draft reports in English or French;
- ability to adhere to the timetable;
- adherence to the budget;

9. Content and presentation of the offer

The offer, which must be submitted in English or French, must include the following:

- an official application letter;
- a detailed CV for each of the coordinators and experts of the Consortium;
- a budget in euros in accordance with the regulations set by the European Commission;



- the applicant's offer specifying how the tasks set-out in the tender will be delivered;
- information on the sub-contractors' experience in similar areas.

10. Publication and terms of the call for tenders

Offers must be received within 25 days of the date of publication of this call for tenders from the European Trade Union Confederation.

The call for tenders will be published on 30 September 2013 (published on the website of the ETUC (www.etuc.org) and sent to three potential service providers). All bids must be received by 25 October 2013, for the attention of Mr Alexandre Martin, ETUC, responsible for projects and EU funding, either by e-mail (amartin@etuc.org) or by post (Bd du Roi Albert II no. 5 – B-1210 Brussels).

A committee of three persons will be formed comprising three equal representatives of the ETUC's organisational entities. 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 then 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 the 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 justification for their selection;
4. the name of the suggested candidate and justification of this choice in terms of the selection or award criteria.

The contracting authority will then make its decision and will pass this on to all the candidates.