



CALL FOR TENDERS FOR SUBCONTRACTING EXPERTISE

This is a call for a subcontractor(s) to provide expertise as part of the implementation of the ETUC project **“New Frontiers for Collective Bargaining – Building Capacities to Bargain in changing workplaces”**.

In order to ensure a large visibility of this call for tenders, the ETUC will publish the tender specifications on its website (<https://www.etuc.org/en/type-de-page/call-tender>) on Monday 15 February 2021 and keep the call open for 30 days (**deadline for submission of bids: 17 March 2021**).

I. Background

The need for strengthening the capacities of social partners to engage in social dialogue and conclude collective agreements has been noted at European level in the Work Programme of the European Social Partners 2019-2021, the European Pillar of Social Rights, the Quadripartite statement on the new start for social dialogue, as well as the European Semester, notably the country specific recommendations issued as part of the spring package calling for effective involvement of social partners in policy making¹. The Political Guidelines issued by President Von der Leyen highlighted the challenges linked to realising the principle of equal pay for work of equal value, as well as the role of collective agreements in delivering fair wages and working conditions. The importance of collective bargaining in addressing working conditions, and new working methods as well as the gender pay disparity, were further highlighted in the communication on a Strong Social Europe for Just Transitions.

This project aims at promoting the objectives outlined in these policy priorities by exploring how collective bargaining can deliver solutions to emerging issues– such as the value of workers’ data, surveillance, tracking, monitoring, working time arrangements etc. - as well as effectively addressing the equal pay for work of equal value.

The COVID-19 pandemic has also shown how collective bargaining is a crucial tool in the hands of unions to ensure worker health and safety, skills acquisition and appropriate work organisation. The return to work and the shifting working practices will mean that collective agreements will need to take account of the new work practices.

These new frontiers for collective bargaining will also require a deeper understanding of the gender aspects. It is vital at this stage that new work practices and the return to work do not exacerbate the existing gender inequalities in the labour market. Collective bargaining can be a key instrument for addressing emerging gender inequalities as well as combatting existing ones. The gendered segregation of the labour market contributes in no small measure to the

¹ As was the case in CSRs for Hungary, Romania and Poland

gender pay gap. In these times of crisis, low-paid female workers, who make up the great majority of the caring and cleaning professions demonstrate the real value of their work for society as a whole. Governments and trade unions have been so far amiss of addressing equal pay for equal value despite the fact that the principle of equal pay on the grounds of sex with regard to all aspects and conditions of remuneration for the same work or for work of equal value, is enshrined in the Equal Pay Directive (Council Directive 75/117/EEC).

This project is designed to get a better understanding of how trade unions could address the issue of equal pay for work of equal value in collective bargaining processes.

Specific objectives

The overall aim of this project is to promote and strengthen collective bargaining at all levels by extending the scope of collective bargaining and developing bargaining strategies to incorporate emerging issues as well as gender inequalities into negotiations and thus place collective bargaining at core of the post COVID-19 recovery. This will be achieved through 2 interlinked tracks.

Track A (New Frontiers): This track will not be included in the expert work.

Track B (Equal Pay): The expert work will be dedicated to this specific track.

This action will focus on how to address gender inequalities in the labour market through collective bargaining. The objectives of this part of the project are to first identify where and how the issue of equal pay for work of equal value has been addressed by member organisations of the ETUC, either as an issue of attention, the form of policy, campaign, discussion, etc. or as part of a collective bargaining process at national or sectoral levels. The aim is also to assess the impact of the issue on trade union policy and where possible to identify good practice which could serve a guide for future policies and action in relation to equal pay for work of equal value. The third objective is to raise awareness of the issue of equal pay for work of equal value among the member organisations of the ETUC.

Main activities

The main activities will be organised in 3 different phases.

First Phase

During this initial phase a quick survey among members of the ETUC will be conducted to determine where the issue of equal pay for work of equal value has been addressed at national, sectoral or individual union levels.

The result of the survey will determine which Member States will be participating in project according to uptake of the issue in policies and campaigns, uptake of the issue in collective bargaining processes. An external expert will be selected and will provide input and support to conduct the survey as well as attend all relevant project events. The steering group meeting during this phase will provide a forum for exchange between the experts, the ETUC team and national and sectoral experts.

Steering Group Meeting (1 day, TBC Brussels, February 2021)

- Target: Trade union experts on collective bargaining and on gender
- Number of Participants: 15 including 5 ETUC representatives, 1 Expert
- Languages: EN

Second Phase

Following the survey during the first phase which will have identified which of Member States to focus project activity on, targeted interviews and, where appropriate, country visits will be done in order to identify specific activities undertaken by member organisations of the ETUC in relation to equal pay for work of equal value. The results will then be discussed at a decentralised seminar organised where specific good practices will be highlighted. The results of the interviews and decentralised seminar will be brought together in a report, which will be launched at a European conference (phase 3, below), which will also be the launch of a media information campaign to highlight the importance of the issue.

Steering Group Meeting (1 day, TBC Brussels, September 2021)

- Target: Trade union experts on collective bargaining and on gender
- Number of Participants: 15 including 5 ETUC representatives, 1 Expert
- Languages: EN

Decentralised Seminar 1 (1.5 days, Venue TBC based in survey results, October 2021)

- Target: ETUC member organisations
- Number of Participants: 35, including 5 ETUC representatives
- Languages: EN, + 3 others TBC

Third Phase

The results of all the previous phases will be brought together in a report, which will be launched at a European conference, which will also be the launch of a media information strategy to highlight the importance of the issue. On-demand national level seminars will be organised to bring the findings of the report to national members and to enable them to develop action plans about how to use the project outcomes in negotiations at all relevant levels.

The communication of the outcomes of both Tracks of this project will be supported through a social media campaign before, during and after the EU level conference. Based on the information in the European strategy and report, communication tools will be developed, including info graphics, a photo action, and a short leaflet/brochure summarising the key messages for each Track (to be translated from English into 6 languages, for a wider dissemination).

Third Steering Group Meeting (1 day, TBC Brussels, March 2022)

- Target: Trade union experts on collective bargaining and on gender
- Number of Participants: 15 including 5 ETUC representatives, 1 Expert
- Languages: EN

EU Level Conference (1-day TBC Brussels, May 2022)

- Target: ETUC member organisations
- Number of Participants: 80
- Languages: EN, FR + 3 others TBC

Up to 5 Ad-Hoc National Seminars (1-day, Venue TBC, May-November 2022)

- Target: ETUC member organisations
- Number of Participants: 25, including national social partners, ETUC representatives, experts from other EU member states.
- Languages: EN + 1 TBC

Workplan:

Time	Track B- Equal Pay
Year 1	
February	Launch of call for tender for subcontracted expertise and selection of successful bid
February	First steering group meeting <ul style="list-style-type: none"> - brainstorming on issues to be focused on during, discussion of kick-off seminar - discussion on surveys to be conducted
February-March	Mapping Survey - (ETUC Women's Committee)
July-September	Analysis of survey and development of resources for decentralised seminars
September	Second Steering Group Meeting <ul style="list-style-type: none"> - Results of first phase (kick-Off seminar, surveys) - Preparation of decentralised seminars - Initial discussion on European strategy
November	Decentralised Seminar
Year 2	
January-March	Drafting of Report (in coordination with ETUC Women's Committee)
March	Third Steering Committee Meeting <ul style="list-style-type: none"> - Planning EU level conference - Planning of communication strategy - Planning of national seminars on demand
March-May	Development of Communication plan on New Frontiers for Collective Bargaining Strategy and Equal Pay for Work of Equal Value, in coordination with the ETUC communications department and internal committees
May	European Level Conference
May-June	Launch of call for applications for ad-hoc national seminars, followed by review and selection of successful proposals
June-November	Ad-hoc national seminars take place including development of national action plans

People

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

- From the **ETUC Secretariat** (5): 1 Deputy General Secretary dossier who is responsible for the project, 1 Head of Trade Union Policy, 1 Media Officer (part-time), 1 Assistant (part-time); 1 Accountant.
- A **Project Steering Committee** will be set up to monitor progress and help drive the work forward. The committee will be composed by:
 - 4 national representatives of the ETUC Women's Committee and the ETUC Collective Bargaining Committee (one Anglo-Saxon, one from a Southern EU country, one from Northern EU, one from CEEC countries),
 - 4 representatives of European Trade Union Federations (ETUFs) (who may also be appointed among ETUFs' national members)
 - 3 persons of the ETUC (the Deputy General Secretary responsible for the dossier, one policy adviser and one project officer (part-time) 1 external expert (see below for the tasks description of the external expert).

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

Calendar of activities

- The project will start on 1 March 2021 and will be implemented over a period of 24 months, until 28 February 2023. The expert(s) is (are) expected to perform their work during that period. A detailed timeline / calendar of activities will be agreed upon with the project team and the expert(s).

II. Tasks to be performed by the subcontractor(s)²

The following tasks could be performed either by one single expert or by a (small) pool of junior experts managed by a senior one.

Description of tasks:

The subcontractor(s) should provide the following services for the applicant organisation:

- Provide expertise on the issues dealt with (industrial relations systems in the target countries (EU 28 + candidate countries), collective bargaining, social dialogue, gender equality issues and in particular work of equal value);
- Assist the ETUC project administrator in organising project steering committee meetings, national/EU level interviews the EU Conference and the Brussels-based event;
- Provide the necessary reporting of the activities and draft the project steering and conference meetings' reports and conclusions;

² Important note: references to "expert" in the text are synonymous to "subcontractor"

- Sit on the project Steering Committee, and work in close coordination with its members throughout the project;
- (*optional depending on methodology submitted*) Select and coordinate a team of junior experts under the supervision of the project Steering Committee.

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

- Propose a methodology to collect trade unions/social partners' practices fighting for gender equality in the labour market through collective bargaining, and in particular work of equal value.
- Carry out a desk research (by the expert and under supervision of the project steering committee) to gather existing practices addressing the topic work of equal value, particularly regarding trade unions' role and collective bargaining (e.g. EIGE, Eurofound, EWL studies, etc.);
- Analyse trade unions' material to be collected via ETUC women's and collective bargaining committee and selection of preliminary good practices (under supervision of steering committee) to be further explored in face to face interviews;
- Conduct (or coordinate junior experts') face to face interviews with gender and collective bargaining experts from national and European trade union representatives (and where possible with employers' representatives) on trade unions' / social partners' strategies. The expert(s) will conduct remote/online interviews, whenever necessary or useful, but a few country visits may be needed in up to 3 EU member states (2 to 3 days per country visit). Interviews will be held in English where possible or in the national language (the assistance of an interpreter could be envisaged in some cases);
- 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.
- Finalise the synthesis research report for the EU-Brussels event.

For the **country visits**, the subcontractor(s) will be required to:

- Prepare a methodology to be discussed during the first Steering Committee meeting on how the country visits will be undertaken. The methodology will include a preliminary draft of questions, target countries and organizations, country reports structure as well as a timeframe for the country visits. It will be presented for discussion and approval during the first meeting of the Steering Committee;
- (*optional depending on methodology submitted*) Submit CVs for junior experts to assist her or him for the country visits, including methodology to be shared by the experts team;
- Work in close cooperation with the Steering Committee members throughout;
- Liaise with the project coordinator and national unions to organise the country visits;
- Analyse the interview responses and draft national country reports resuming the findings of country visits to be validated by ETUC members.
- Present the preliminary conclusions in the EU conference and in the synthesis research report.

For the **EU conference** the subcontractor(s) will be required to:

- Present and discuss the results of the desk research and country visits reports in the EU conference;
- Following the second Steering Committee meeting, coordinate with ETUC on the organisation of the EU Conference and the preparation of documents (including drafting of agenda, background papers, presentation materials etc.);
- Provide advice on 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 work of equal value is essential;
- Integrate the results of the discussions in the synthesis research report.
- Finalise the report (including country visits reports) following the Steering Committee meeting;
- Draft the conference report (main issues discussed and conclusions).

For the **European Brussels-based event** the subcontractor(s) will be required to:

- Attend the event and be available for possible chairing a round table.
- Draft the conference report (main issues discussed and conclusions).

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

- Draft a synthesis research report (50 pages max) to be used as a discussion at the Brussels based event, integrating the results of the country visits and EU Conference event and present final recommendations;
- Submit a final draft of the report to the project administrator and Steering Committee members and at least 2 months before the European Brussels-based event in order to enable its translation and publication.

III. Expertise, experience and skills required

Sound expertise is required on the following issues:

- Expert knowledge of gender equality particularly regarding the issue of work of equal value as well as collective bargaining systems and industrial relations systems in Europe (Senior expert: + 10 years, Juniors: + 3);
- Ability to identify and integrate analyses of current labour market issues faced by employers' and trade unions' organisations in the EU countries;
- Sound 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 (Senior expert: + 10 years, Juniors: + 3);
- Running and animating national/EU seminars/conferences on two or more of the following themes: industrial relations/social dialogue/gender equality/work of equal value (Senior expert: + 10 years, Juniors: + 3);
- 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 (Senior expert: + 10 years, Juniors: + 3);
- 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(s) will be asked to work from March 2021 to February 2023 (the 24-month project duration). The subcontractor will be responsible for submitting the deliverables foreseen in the project methodology within the above time frame. Specific deadlines for all deliverables will be agreed upon with the ETUC.

The subcontractor(s) will be asked to work for an estimated number of days ranging from 50 to 70 days, dedicated to:

- attending the steering meetings, the EU Conference + country visits;
- the preparatory phase of the synthesis research report (preparation of first Steering Committee meeting, compilation of interviews and analysis of responses)
- preparing materials for the EU Conference and drafting the synthesis research report to be presented and discussed at the Conference.
- finalising the synthesis report following the Conference
- attending of the EU Brussels-based event.

V. Payment

The total maximum budget available for expertise is as follows:

Contract with ETUC	
Main activities and Meetings	
<ul style="list-style-type: none"> ➤ Desk research ➤ Steering Committee Meeting # 1 ➤ National / EU interviews ➤ Country visits ➤ Coordination of junior experts' team (<i>optional</i>) ➤ Steering Committee Meeting # 2 ➤ 1 EU Final Conference ➤ Steering Committee Meeting # 3 ➤ Final Synthesis Research Report ➤ 1 Brussels-based event ➤ Meetings reporting 	
Expertise	€
	35.000 € (VAT and all taxes included)

The subcontractor(s) will be remunerated in various instalments (advance and final payment). This amount does not include the travel and subsistence costs incurred for the study visits, Steering Committee meetings and other project meetings. These will be covered by ETUC on the basis of EU rules & thresholds.

VI. Selection criteria

Subcontractor(s)

The offers will be examined against the following criteria:

- Ability to propose a tailored methodology to prepare and realise a synthesis research report survey, country visits 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/work of equal value;
- 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/work of equal value with a European perspective;
- Expert knowledge of industrial relations systems at EU level, collective bargaining, gender equality (particularly work of equal value);
- 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 35.000 euros (VAT and all taxes included all taxes).

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

This call for tenders will be published on the ETUC website on Monday 15 February 2021. Offers must be sent within 30 days of the date of publication of this call for tenders on the ETUC website, by **17 MARCH 2021**. Offers must be sent to ETUC, in electronic format (by e-mail to amartin@etuc.org), indicating clearly "Tender: **New Frontiers for Collective Bargaining**".

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