

Call for tenders to produce a publication to support trade unionists “Negotiate the content of standards”.

This call for a subcontractor to provide written training material in English is issued as part of the implementation of the “ETUC STAND” project Work Programme 2024.

The ETUC call for tender will be publicly available on its website, as of 9 July 2024, and for 38 calendar days. The deadline for submission of bids is 16 August 2024.

1. Introduction and background information on the project

Trade unionists, new to the standardisation setting activities at all levels - national, European and international -, are often not familiar with standardisation processes or are underrepresented in technical meetings. Hence, experts from trade unions face significant challenges that prevent them from negotiating on equal terms with other often more experienced stakeholders.

The ETUC is therefore aiming at preparing a publication in the format of a handbook (or similar) to support its experts and help them navigate through the different processes when participating in national, European and/or international standardisation activities. The purpose of this handbook on “Negotiating the content of standards” is to provide a practical tool or guide for union representatives, with relevant and comprehensive information on standardisation, and with useful tips to be used before, during and after technical meetings, (i.e. during the drafting process of the standard) so as to engage more strategically in the process.

2. Objectives of the project

The handbook to be produced – in English - will aim to provide in a user friendly format:

- A brief understanding of what standards are and the different kinds of standardisation deliverables;
- An outline of the standardisation ecosystem, including all 3 levels (national, European, international) and their interplay;
- Concise information on the development process of European and international standards;
- Explanations on the link between standards and EU legislation, including the New Approach, the New Legislative Framework and harmonized standards;
- The means of participation for unions;
- Setup, responsibilities (roles) and way of working (including the concept of consensus) of a standardisation technical committee (TC)/ working group (WG)

- Standardisation language (e.g. the difference between the terms “shall” and “should”) and a list of jargon/terms and their explanation:
- Tips and tricks on how to include unions’ points and arguments in the text of standards (e.g. normative vs informative parts) and the most appropriate stages of the process to influence results;
- A list of what to do before, during and after a standardisation meeting, (e.g. seeking allies, etc);
- List of good references in standards.

3. Tasks to be performed by the subcontractor

The desired outcome of the publication is to contribute to build trade union capacity in negotiating the content of standards to better address unions’ concerns and needs; and to increase trade unions’ representation in standardisation at all levels, and in particular at national level.

The subcontractor will conduct various tasks including:

- desk-research,
- gather and analyse relevant material some of which will be provided by the ETUC secretariat,
- regularly consult a dedicated Expert Reference Group gathering experienced experts set up by the ETUC secretariat,
- the Expert Reference Group will assess and “sign off” the final publication, in particular regarding its content;
- The subcontractor will be asked to present the handbook to ETUC experts at a workshop organised by the ETUC secretariat.

The expected outcome is an easy to use handbook ‘Negotiating the content of standards’ with practical guidelines and advice for union representatives. The publication will be written in English and should have ideally around 25-35 pages (A4 format, according to EN ISO 216:2007).

4. Deliverables:

- Kick-off meeting with ETUC secretariat; and following that, interviews with Expert Reference Group;
- Ongoing exchange and consultation with Expert Reference Group;
- Interim updates on the state-of-play of the publication via bi-weekly calls;
- Draft handbook for feedback (two rounds);

- Final handbook, incl. an executive summary;
- Final workshop (format to be defined) – with TU officials and TU representatives in standardisation.

The Expert Reference Group will judge and “sign off” the final publication, in particular regarding its quality level, to be in line with other ETUC publications.

5. Expertise, experience and skills required

The following proven expertise is required:

- Excellent command of English;
- Excellent communication and narrative skills;
- Proven experience in drafting similar publications;
- Knowledge of standardisation activities in CEN and ISO, of technical standards and its impact on workers/trade unions ;
- Ability to deliver within specified deadlines and to respect budgetary limits;
- Good overall project management skills.

6. Time schedule and reporting

The subcontractor will be asked to start performing the above-mentioned tasks on 2 September 2024, and to have finalised the publication by 4 November 2024.

An overall timeline follows:

- Week 2-6 September 2024: Kick-off meeting with ETUC secretariat;
- September 2024: Ongoing exchange and consultation with Expert Reference Group (including an introductory call with the experts as a group);
- September 2024: Interim updates on the state-of-play of the handbook via bi-weekly calls;
- 2 October 2024: Draft handbook for feedback from ETUC secretariat and Experts reference group. This should include two rounds of feedback;
- 4 November 2024: Final handbook, incl. an executive summary;
- 11 November 2024: Final workshop (online format) – with TU officials and union representatives in standardisation.

7. Payment

The total maximum budget available for the fees of the subcontractor is 8.000 € (VAT and all taxes included).

The subcontractor will be remunerated in two instalments (advance and final payment).

In case of need for travels, preliminary agreement must be asked to the ETUC. To cover this, ETUC foresees in travel and subsistence costs that may be incurred. 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;
- Respect of the budgetary and time constraints.

9. Form, structure and content of the tender

Tenders must be written in English. They must be signed by the tenderer or their 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 9 July 2024, and will be kept online for 38 calendar days. Offers must be sent at the latest on 16 August 2024. Offers/quotes must be sent to ETUC in electronic format (by e-mail to amartin@etuc.org and gdejongh@etuc.org), and refer to the “ETUC STAND Project – Negotiating Standards”.

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