



## 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 “Trade unions’ strategies to prevent, manage and eliminate work-place harassment and violence against women”.

In order to ensure a large visibility of this call for tenders, the ETUC will publish the tender specifications on its website (<http://www.etuc.org/call-for-tender>) and keep it online for 35 calendar days (deadline for submission of bids: 1<sup>st</sup> January 2016).

### I. Background

The European Trade Union Confederation (ETUC) has always been at the forefront of the combat against this appalling human rights violation. In 2011, the ETUC adopted its Strategy and Action Plan that states that “*economic dependence and sexist stereotypes contribute to inequality and violence*” and called for “*a new European legal instrument to combat violence against women*”. Furthermore, the ETUC Gender equality work programme adopted in 2012 contains a specific priority to step up trade unions’ action in tackling gender based violence, including exploring the link between link between domestic violence and the work-place.

In 2012, the ETUC co-signed a statement together with ETUCE and ILGA-Europe to mark the International Day Against Homophobia and transphobia where we re-affirmed our commitment to prevent and combat jointly homophobic bullying at school, in workplaces and society and to work towards those objectives.

The 2014 8<sup>th</sup> of March survey findings, confirmed both the need and willingness of trade unions to pursue their work to eliminate gender-based violence and strengthen coordination in this field. The economic context and the crisis are challenging women’s position in the labour market and.

Between December 2013 and March 2014 the ETUC carried out the 8<sup>th</sup> of March Survey 2014<sup>1</sup> among its affiliated organisations to collect information on how they address the issue of violence against women, and to identify trends and shared concerns. The survey found out that:

- A large majority of unions in Europe address the issue of violence against women.
- Sexual and moral harassment are the two forms of violence mostly addressed by unions. Work-place violence is more tackled than domestic violence.
- Most unions address gender equality in collective bargaining agreements, but only a few have incorporated the specific issue of violence against women.

---

<sup>1</sup> Available at: <http://www.etuc.org/etuc-8th-march-survey-2014>

- Most confederations and all the ETUFs have carried out different sorts of bipartite initiatives (negotiations, recommendations, joint declarations, trainings, awareness raising events, etc.) with employers to address the issue of violence against women.
- Most unions take part in tripartite discussions at national level to address the issue of violence against women. The involvement can take different forms: participation in a governmental body, speaking during public consultations or hearings, taking part in national-led programmes / campaigns, etc. Unions can be involved in the different steps of the decision-making process: elaboration, promotion, monitoring and co-management.
- A majority of ETUC members have adopted a political document addressing the issue of violence against women over the last years: a political statement, a resolution / motion, an action plan setting out a set of concrete actions to undertake.
- A significant number of unions have organised public events to discuss the issue of violence against women.
- A majority of unions have published studies, brochures, trade unions' manuals, awareness raising leaflets on the issue of violence against women.
- Nearly half of unions has taken part in demonstrations, parades, events aimed at raising awareness on violence against women.
- A large majority of unions cooperate with other confederations at national level to address the issue of violence against women. Many confederations involve their affiliate members at regional, local and/or sectoral level in gender-related projects.
- A substantial number of confederations and national federations cooperate with civil society organisations in the field of violence against women.

The findings have led the ETUC to pursue its work in this area in order to collect, analyse and assess successful practices (including collective bargaining agreements) aimed at:

- 1. Preventing, managing and eliminating violence and harassment at the workplace by looking at it with a gender dimension;**
- 2. Addressing the link between domestic violence and workplace violence.**

The ETUC project therefore aims at:

- Developing and improving trade union knowledge and instruments addressing the gender-based violence and harassment at work-place;
- Include gender-based violence and harassment in the negotiating agenda;
- Improve/promote gender mainstreaming into work organization as well as in collective bargaining and social dialogue;
- Sharing successful trade unions and/or social partners' initiatives on eliminating gender-based violence and harassment at work;
- Producing material to raise awareness among a wider audience about the need for a systematic inclusion of gender when dealing with violence and harassment at work-place level and extend it at sectoral and national level;
- Contributing to the recommendations contained in the EP Resolution to fight violence against women;
- Providing a concrete contribution to adopt an international labour standard to address gender-based violence at work.

This work will enable the ETUC to develop a trade union strategy at European level and put forward guidelines aiming at eradicating violence against women. It will also contribute to further encourage trade unions' work to deal with preventive measures against violence and harassment towards women in the labour market.

### Main activities

To meet the above objective we plan the following main activities:

- A **synthesis research report** will be completed on trade unions/social partners' practices tackling the two above described dimensions of workplace violence. The report will have to be translated from English into five languages (French, German, Spanish, Italian, Polish);
- **Interviews** will be conducted by an external expert (or a small team of experts) in up to ten member states (2 to 3 days) and in Brussels (to EU stakeholders) to be conducted with gender experts from national and European trade union representatives on trade unions' strategies to address violence against women at work-place. Interviews will be held in English and in some cases with the assistance of an interpreter (paid by the ETUC);
- 1,5 day **European Conference in 2016**. Presentation of comparative data and good practices based on the material collected by the external expert and validated by the Project steering committee. The conference will bring together around 100 participants, mainly trade unionists but also public authorities, business organizations, civil society, researchers and academics, etc. from all over EU-28 as well as candidate countries to the EU. Five active working languages: EN, FR, IT, DE, PL (this first selection will be confirmed according to the needs of the registered participants) and two passive (ES, SW). Another (3rd) meeting of the Committee could be envisaged right after the Conference, as a follow up of the event.

### People

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

- From the **ETUC Secretariat** (4): 1 Confederal Secretary in charge of the Gender Equality dossier who is responsible for the project, 1 Adviser on gender affairs, 1 Administrative assistant; 1 Accountant.
- A **Project Steering Committee** will be set up to monitor progress and help drive the work forward. The committee will be composed of:
  - 1 member of the Presidium of the ETUC's Women's Committee,
  - 4 national representatives of the ETUC Women's Committee (**one** Anglo-Saxon, **one** from a Southern EU country, **one** from Northern EU, **one** from CEEC countries),
  - 2 representatives of European Trade Union Federations (ETUFs) (who may also be appointed among ETUFs' national members)
  - 1 expert team leader (see below for the tasks description of the external expert team leader) and
  - 2 persons of the ETUC (the Confederal Secretary responsible for the dossier and her adviser).

This Committee will meet 4 times during the course of the project (3 separate meetings + one short steering committee meeting straight at the end of the final conference, to take advantage of the

presence of all members of the steering group) and will work in English.

### **Calendar of activities**

- The project duration started on 1 November 2015. The expert(s) is (are) expected to start working in January 2016 and to end in January 2017.

\*\*\*

## **II. Tasks to be performed by the subcontractor(s)<sup>2</sup>**

**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 gender-based violence);
- Assist the ETUC project administrator in organising project steering committee meetings, national/EU level interviews and the EU Conference;
- Provide the necessary reporting of the activities and draft the meeting documents and conclusions;
- Sit on the project Steering Committee, and work in close coordination with its members throughout the project.

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

- Propose a methodology to address trade unions/social partners' practices tackling the two above described dimensions of gender based violence.
- Carry out a desk research (by the expert and under supervision of the project steering committee) to gather existing practices addressing the topic of violence against women, particularly regarding trade unions' role and collective bargaining (e.g. FRA survey, EU SPs Framework Agreement on Harassment and Violence implementation reports; EIGE, Eurofound, EWL studies, etc.);
- Analyse trade unions' material collected in the context of the ETUC 8th of March survey 2014 and selection (under supervision of steering committee) of preliminary good practices to be further explored in face to face interviews;
- Conduct face to face interviews in up to ten member states (2 to 3 days) and in Brussels (to EU stakeholders) with gender experts from national and European trade union representatives on trade unions' strategies to address violence against women at work-place/and link between domestic violence and work-place. Interviews will be held in English where possible or in the national language (the assistance of an interpreter could be envisaged in some cases);

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

---

<sup>2</sup> Important note: references to "expert" in the text are synonymous to "subcontractor"

- Prepare a preliminary draft of questions to be addressed to target people and to be discussed during the first Steering Committee meeting, finalise the draft following the meeting and present it for final approval by the Steering Committee;
- Work in close cooperation with the Steering Committee members throughout;
- Liaise with the project coordinator and national unions to organise country visits;
- Analyse the interview responses and present the main conclusions in the final conference and in the synthesis research report.

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

- 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;
- Present and discuss the results of the desk research and interviews in the EU conference;
- Following the second Steering Committee meeting, coordinate with ETUC on the organisation of the Final Conference and the preparation of documents (including drafting of agenda, background papers, presentation materials etc.);
- Coordinate with the Steering Committee 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 gender based violence is essential;
- Integrate the results of the discussions in the synthesis research report;

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

- Draft a synthesis research report (80 pages max) to be used as a discussion at the Final Conference, integrating the results of the interviews and present initial recommendations;
- Following the Conference, integrate a summary of the conference and the main conclusions;
- Present a consolidated draft of the report in line with the methodology defined, at the 3<sup>rd</sup> Steering Committee meeting;
- Finalise the report following the Steering Committee meeting.

### **III. Expertise, experience and skills required**

Sound expertise is required on the following issues:

- Expert knowledge of gender equality particularly regarding the gender based violence as well as industrial relations systems (Senior expert: + 10 ys: Juniors: + 3);
- Ability to identify and integrate analyses of current labour market issues faced by employers' and trade unions' organisations in the EU countries;
- Good 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 ys: Juniors: + 3);
- Running and animating national/EU seminars/conferences on two or more of the following themes: industrial relations/social dialogue/gender equality/gender based violence (Senior expert: + 10 ys: 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 ys: 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 **11/01/2016 to 01/01/2017**. The subcontractor will be responsible for submitting the deliverables foreseen in the project methodology within the above time frame.

The subcontractor(s) will be asked to work for approximately 65 days, of which:

- 28 days are dedicated to attendance of the steering meetings and the EU Conference + interviews of relevant stakeholders;
- 10 days are considered necessary for the preparatory phase of the synthesis research report (preparation of first Steering Committee meeting, compilation of interviews and analysis of responses)
- 4 days are considered necessary for the preparation of the second Steering Committee meeting;
- 10 days are considered necessary to prepare materials for the Final Conference and to draft the synthesis research report to be presented and discussed at the Conference.
- 13 days are considered necessary for finalising the synthesis report following the Conference.

#### **V. Payment**

The total maximum budget available for expertise is as follows:

<b>Contract with ETUC</b>	
<b>Main activities and Meetings</b>	
<ul style="list-style-type: none"><li>➤ Desk research</li><li>➤ Steering Committee Meeting # 1</li><li>➤ National / EU interviews</li><li>➤ Steering Committee Meeting # 2</li><li>➤ 1 EU Final Conference</li><li>➤ Steering Committee Meeting # 3</li><li>➤ Final Synthesis Research Report</li></ul>	
<b>Expertise</b>	<b>€</b>
Expert 550€ x 65 days	<b>35,750 €</b>

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 attending project meetings and for the country visits (to conduct interviews, research). These will be reimbursed to the expert, 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 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/gender based violence;
- 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/gender based violence with a European perspective;
- Expert knowledge of industrial relations systems at EU level, collective bargaining, gender equality (particularly gender based violence);
- 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 35,750 euros.

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 tender will be published on the ETUC website on 27<sup>th</sup> November 2015. **Offers must be sent within 35 days of the date of publication, by 1st January 2016.** Offers must be sent to ETUC, in both formats: electronic (by e-mail to [amartin@etuc.org](mailto:amartin@etuc.org)) and as a paper copy (see contact details below).

Concerning the paper copy, to ensure confidentiality, bidders must submit their offer in a double envelope. Both envelopes must be sealed and the inside envelope shall not only bear the name of the department for which it is intended (see below), but also the words "*Tender 'VAW'project – not to be opened by the Mail Department*" (Appel d'offres – à ne pas ouvrir par le service du courrier). If self-adhesive envelopes are used, they must be sealed with adhesive tape crossed by the signature of the sender.

A committee will be formed comprising three representatives of the ETUC Secretariat. 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 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.

The contracting authorities will then make their decision.

Candidates must send their bid electronically (to the following e-mail address: [amartin@etuc.org](mailto:amartin@etuc.org)) as well as submitting a paper copy of their bid, either delivered by hand or by registered mail or special courier service to:

<p><b>ETUC</b> Montserrat Mir Confederal Secretary International Trade Union House Boulevard du Roi Albert II, 5 B – 1210 Brussels</p>
--

For bids sent by registered mail, the postmark will serve as proof of the date of dispatch.