

Trade Unions and Drivers for Safer Roads in Europe VS/2019/0289



Tender specification for subcontracting **External expert - Driver fatigue in European road transport**

Part I – The contract

1. Title and purpose of the contract

Scientific expertise on: Driver fatigue in European road transport

In the frame of the EU funded project “Trade unions and drivers for safer roads in Europe”, the ETF is looking for an external expert who will perform a research, conduct interviews and compile a scientific study on driver fatigue in passenger and freight transport.

The draft study will be subject to a “check” during four events hold during the course of the project. Subsequently, the expert will integrate the feedback from these events into the text and compile a final version that will be presented at the final conference.

The chosen external expert shall contribute to the successful achievement of the objectives of the project by collecting relevant information and preparing scientific study on driver fatigue. The context of the project and the tasks are described below.



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2. Context of the contract / Project description

Road safety is one of the key priorities of the EU Institutions. The European Commission set the ambitious target to halve the number of road deaths between 2010 and 2020 but unfortunately there is a too slow progress towards reaching this goal. An EC factsheet entitled “2017 road safety statistics: What is behind the figures?” published last year points out to the fact that “After two years of stagnation (2014 and 2015), the number of road fatalities was reduced by 2% in 2016, and by another 2% in 2017. While the last two years give rise to some optimism, it will be very challenging for the EU to reach its ambitious target of halving the number of road deaths between 2010 and 2020.”

This means more must be done to improve road safety. In the ETF view, at the core of this goal stays the need to make sure that the problem is not compounded by having drivers distracted, fatigued, and overloaded. Particularly not those that are driving buses, coaches and 20/30 tonne vehicles.

According to the latest EC statistics (dated 2015), 14% of the cycling fatalities came as a result of crashes with large commercial vehicles. Large vehicles were also responsible for 42% of pedestrian fatalities. More than 600 people, passengers and professional drivers, died in crashes involving buses, coaches and trucks (**Source:** European Commission “Care Reports” & European Commission report “Traffic data basic facts 2016: Heavy goods vehicles and buses”).

Prompted by these facts and figures, in a joint statement, the ETF and three other European organisations taking an interest in road safety – notably the European Cyclists’ Federation, the European Federation of Road Traffic Victims and the European Transport Safety Council – affirmed that “Collisions involving heavy goods vehicles, buses and coaches, affecting other road users and drivers alike, are regrettably still all too common. Given their size and weight, collisions involving these larger vehicles often lead to higher numbers of deaths, particularly amongst cyclists, pedestrians and powered two wheelers. Likewise, a single collision involving a bus or coach can result in many more deaths given the number of passengers on board.”

Mindful of the above, there seem to be a general understanding that commercial road transport of freight and passengers does play a role in improving road safety. However, one of the main sources of this problems, namely the driver fatigue and rest conditions, is given but little attention. To the ETF knowledge, the last EU-wide study on driver fatigue in commercial road transport was conducted by the ILO in 2005 (“The issues of fatigue and working time in the transport sector”) and conclusions are clear: poor rest conditions and prolonged working time in road transport does lead to sleep deprivation and driver fatigue. This ultimately impacts on road safety.

At national level, in EU Member States, we do however come across studies and more in-depth statistics with regards to road accidents and their causes. Just a couple of examples: a quick review made by the ETF last year showed press reports in Belgium reporting that in the first 5 months of 2018, between 1 and 3 accidents involving trucks, buses and coaches happened every week. In 2016 in Belgium the average number of accidents involving trucks was of 6 per day – a total of 2055 for the year.

The **purpose of this project** is to build capacity among the ETF member organisations to address driver fatigue in passenger and freight transport, with policy-makers, with their own members, and with employers within the frame of national, company-level and European social dialogue.



The project outcomes will be: a) a scientific case around driver’s fatigue in road passenger and freight transport; b) a **tool kit** for the trade union use, to raise awareness on driver fatigue.

3. Reasons for contracting out the implementation of the work

The external expert is needed due to the specific expertise, which the project partners do not have in-house, as well as due to organisational constraints within the ETF.

4. Tasks to be performed by the external expert

The expert has to perform the following tasks:

- Conducting secondary scientific research on existing national studies on fatigue in the bus, coach and haulage transport;
- Developing a survey for drivers on fatigue and performing targeted interviews;
- Compiling and analysing the results of the research, the survey and the interviews;
- Participating in three steering committee meetings;
- Contributing to one seminar, two workshops and the final conference;
- Finalising the study on driver fatigue in Europe.

The result will be a study on driver fatigue in Europe.

The working language of the external expert is English. Different tasks are foreseen to obtain the expected results:

1) Secondary scientific research

Duration: March-April 2020, 2 months

Content: Desk research on existing national studies on fatigue in bus, coach and haulage transport and contact academics specialised in the topic of fatigue and road safety.

Method: Secondary research

| Research area | Tasks | Output |
|--|--|--|
| National and European studies on fatigue, topics e.g. <ul style="list-style-type: none"> • Causes • Impact • Prevention | <ul style="list-style-type: none"> • Analysis of the material • Drafting a report, topics to include: 1) scientific case on driver fatigue; 2) Collection of cases and drivers’ testimonials; 3) Causes for recent accidents based on existing materials | <ul style="list-style-type: none"> • Report |



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2) Empirical research: Survey and interviews

Duration: April-August 2020, 5 months

Content: Driver survey and targeted interviews (passenger and freight transport) based on a pre-determined questionnaire.

The expert has to draft a survey for drivers that will collect empirical data. He/she has to organise the distribution of the questionnaire via the trade unions indicated by the members of the Project Steering Committee (PSG).

The expert has to draft interview guidelines and has to organise interviews with trade union representatives and drivers indicated by the PSG members.

Target groups: trade union representatives and drivers. The results shall be available in English.

Method: Written questionnaire, interviews based on written interview guidelines.

| Research area | Tasks | Output |
|------------------|---|---|
| Drivers' fatigue | <p>Survey</p> <ul style="list-style-type: none"> Preparation of the target-group specific survey Preparation of the target-group specific distribution Implementation of written answers in the local language, following up, answering questions Analysis of the answers and creating a presentation of results Consultation with project promoter and SC <p>Interviews</p> <ul style="list-style-type: none"> Preparation of the target-group specific interview guidelines Initiation of target group contacts Conduction of oral interviews in person and by phone in the local language, follow-up Evaluation of oral interviews and creating a presentation of results | <ul style="list-style-type: none"> Results as part of the report |

3) Participation in 3 Steering Committee Meetings

Place, Date, Duration:

- SCM 1: 26 February 2020, Tallinn, 1 day
- SCM 2: 18 June 2020, Vienna, 1 day



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- SCM 3: 17 February 2021, Rome, 1 day

The expert will take part in the three steering committee meetings to present the research work.

| Event | Tasks | Output |
|--|---|--------------------------|
| 1st Steering Group meeting | Introduction of the selected expert and briefing of tasks. Presentation and agreement on the methodology and timeline of the study i.e. desk research on existing national studies on fatigue in bus, coach and haulage transport; driver survey and targeted interviews (passenger and freight transport) based on a pre-determined questionnaire, compilation and analysis of results, etc. | |
| 2nd Steering Group meeting | Presentation of the first draft of the general part of the driver fatigue study , which will include: 1) a list of national studies on fatigue; 2) a general scientific case covering professional drivers in both passenger and freight transport. | Draft study |
| 3rd Steering Group meeting | Presentation of the driver fatigue study in its final draft , which will include: 1) the general part; 2) two specific parts on passenger and freight transport. Based on the study content, PSG in cooperation with the expert to define the content of the tool kit for trade union use. | Final draft of the study |

4) Contribution to 1 seminar, 2 workshops and the final conference

Place, Date, Duration:

- Seminar: 28-29 April 2020, Bratislava
- Workshop 1: 16-17 September 2020, Copenhagen
- Workshop 2: 18-19 November 2020, Madrid
- Final conference: 20-21 May 2021, Brussels

| Event | Tasks | Output |
|--|---|---|
| Seminar (attended by a mix of drivers and trade union representatives with expertise in fatigue – both passenger and freight) | Expert to present the questionnaire on basis of which interviews with drivers will be conducted. Expert to present a preliminary list of national studies on driver fatigue. | Draft questionnaire List of national studies |



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| transport) | Participants (particularly drivers) and expert to test the questionnaire and to contribute with further specialised literature from their respective countries, on fatigue. | |
| 1st Workshop for passenger transport (attended by drivers and trade union representatives with expertise in fatigue in passenger transport) | Expert to present the general part of the driver fatigue study, updated according to the recommendation of the PSG. Workshop participants to define together with expert those elements contributing to driver fatigue in passenger transport , such as combination of working time and driving time, extensive working time schedules, periods of availability, additional tasks to driving. | Draft study |
| 2nd Workshop for freight transport (attended by drivers and trade union representatives with expertise in fatigue in freight transport) | Expert to present the general part of the driver fatigue study, updated according to the recommendation of the PSG. Workshop participants to define together with expert those elements contributing to driver fatigue in freight transport , such as combination of working time and driving time, extensive working time schedules, periods of availability, additional tasks to driving. | Draft study |
| Final conference | Presentation of the research results and the study | Final study |

5) Finalisation study

Date, Duration: September 2020-May 2021, 9 months

| Research area | Tasks | Products |
|---------------|----------------------|---|
| Study | Finalising the study | Study containing the scientific case on driver fatigue, assessment of the causes and the impact on safety in passenger and freight transport. |

4.1 Guidance and indication on tasks execution and methodology

Concrete guidance will be given by the PSG and the project manager during implementation.



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5. Expertise required and profile

The tenderer shall have experience in social and/or psychological science and shall prove her/ his expertise with examples of her/ his work. The contract will only be awarded to tenderers that can prove that they fulfil the following criteria:

- Fluent in English (both oral and written) and extensive writing skills
- Sound background in industrial relations
- Experience in drafting studies in social science and/or psychology and conducting interviews in different countries;
- Cooperation contacts in different European countries and/or personnel with relevant European language skills;
- Experience in supporting international projects with diverse partners;
- Capacity to manage the tasks within the budget maximum amount.
- Knowledge of the transport sector is an asset.

6. Time Schedule and reporting

The expert will be asked to work 60 days from 1 January 2020 until **30 April 2021**, including attending three PSG meetings, one seminar, two workshops and the final conference. Travel, accommodation and subsistence costs for journeys will be reimbursed according to EU rules.

The expert will work under the guidance of and will report to the PSG and the Project Manager. The specific deadlines for deliverables will be set jointly by the contractor and the ETF according to the project's timeline.

Delivery of the final products shall be the latest on **30 April 2021**.

7. Payments and standard contract

The expert will receive an advance and final payment following the EU rules and upon receipt of a correct invoice. Payments will be made in three phases:

- 30 per cent upon presentation of the draft study at the seminar on 28-29 April 2020
- 35 per cent after the mid-term assessment by the two workshops
- 35 per cent after the work is finalised

The payment of the 2nd and 3rd instalment will be made subject to the approval of the PSG considering the quality and completeness of the work in the respective stage of the project.



8. Price

The maximum budget available (covering all taxes including VAT) is 60.000 EUR, i. e. 60 days x 1000.00 EUR (without travels, hotel and subsistence costs).¹

Part II – The tendering procedure

1. Selection criteria:

The offers will be examined by the PSC against the following criteria:

| Criterion | Description | Value |
|---|---|--------------|
| Price | Best value for money | 30 per cent |
| Quality and expertise | Proven expertise in: - communication - developing of didactical materials - industrial relations - knowledge of labour legislation - change management | 40 per cent |
| Approach | Structured and open approach | 20 per cent |
| Ability to write and speak in clear and concise English | | 10 per cent |
| TOTAL | | 100 per cent |

2. Award criteria

The contract will be awarded to the tender offering the best value for money, taking into account the selection criteria developed under 9. The respect of the principles of transparency and equal treatment with a view to avoiding any conflict of interest will be undertaken. It should be noted that the contract will not be awarded to a tenderer who receives less than 70% on the Award Criteria.

¹ Services delivered from outside of Belgium are subject to Belgian 21 per cent VAT which must be considered as included in the total price.



3. Content of the bids

The bids must cover all the elements stated above and in particular prove suitability of the tenderer and his expertise.

The bids must indicate how candidates meet the criteria listed above, present a draft working plan, a draft schedule for the tasks to be performed and indicate the total price of the consultancy. In case of bids submitted by individual candidates, a CV should be attached. This should include a list of publications and works done by the applicant in the fields relevant for the tasks to be performed. References should also be provided.

In case of bids submitted by organisations a list of the organisation's activities in fields relevant for the tasks to be performed should be attached as well as the CVs of the people who will be involved in the project.

Organisations and consortia should also indicate a contact person who will be responsible for the supervision of the tasks and who will report to the project promoters.

Only bids in English will be considered.

4. Presentation of the bids

The bids must include the signature of the legal representative and the CV of the expert(s) implementing the action. Please send your bids by e-mail to

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Deadline for the offer: 31 January 2020



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