

# Social Conditions in Bus and Coach Transport in Europe VS/2020/0501



## Tender specification for subcontracting External expert II – Development of an ETF toolkit to guide trade unions' responses

### Part I – The contract

#### 1. Title and purpose of the contract

Scientific expertise on: Social Conditions in Bus and Coach Transport in Europe. Development of an ETF toolkit to guide trade unions' responses.

In the frame of the EU funded project "Social Conditions in Bus and Coach Transport in Europe", the ETF is looking for an external expert who will develop a toolkit to offer an overview of the main problems bus and coach drivers are confronted with, and guidance on how trade unions can address these problems.



With financial support from the European Union

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The toolkit will be subject to a “check” during the 3<sup>rd</sup> workshops hold during the course of the project. Subsequently, the expert will integrate the feedback from these events into the development 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 giving guidance to the trade unions how to respond to the challenges in bus and coach transport. The context of the project and the tasks are described below.

## 2. Context of the contract / Project description

In 2018, as a result of the EU funded project ‘Building the Future for the Road Sector – Transport Workers Getting Involved’, the ETF compiled a report on market organisation, social and labour conditions and law enforcement in the bus and coach sector. The document gives a brief overview on the three topics. The report was instrumental in guiding the ETF work on bus and coach ever-since. Based on the outcome of a survey on working conditions covering 700 passenger transport drivers, the ETF managed to engage in a meaningful debate with policy makers and contribute to the shaping up of the Mobility Package. The report has gradually become a reference document for the ETF Road Section passenger working group – a permanent statutory forum of our Section – and sparked debates and exchanges on best instruments to improve drivers’ conditions within the context of rapid market developments.

In regular bus service (special regular included), pay and the working time - particularly waiting times and the way they are accounted for – are two of the main problems. In occasional international transport (coach tours) apart from the prolonged working hours, drivers are confronted with issues ranging from work life balance - particularly problematic due to the seasonal nature of this job – to concrete elements such as provision of accommodation when driving groups abroad. The main trade union instrument to address these aspects is the collective labour agreement (CLA). Reports on CLAs have dominated the agenda of the recent ETF passenger working group meetings. Reports by working group members on the content and structures of CLAs reveal a diversity of cultures and approaches, as well as different levels of tackling new trends in the markets and new business models. In Italy, the trade unions signed a CLA with platform operators (FlixBus). Trade unions from Germany and Belgium have experienced concluding CLAs in fully and semi liberalised markets, while in Sweden trade unions have a CLA that covers both public transport and bus and coach drivers, thus eliminating risks for potential pay gaps across the road passenger transport. The Dutch trade unions have one of the best CLA for occasional international transport.

Having taking note of all these elements during the past couple of years, the ETF and its member organisations are still struggling to get the full picture on the future market trends and developments – not ignoring the impact the COVID-19 pandemic on the passenger transport in the EU – and on possible best trade union responses via the CLAs.

**The purpose of this project** is to develop a solid base of information to assist the ETF organise exchanges of experience and of best practice between its member organisations, in the road passenger sector. Ultimately, this will enable us to have the right responses in terms of safeguarding drivers’ pay and conditions, in an ever-changing market. At the end of this project, based on the collected data and evidence, the ETF should be able to provide tools to assist its members manage the change.



The ETF would therefore like to engage in a systematic collection of data on national legal provisions regarding salaries and wages, employment contracts, working conditions and required qualifications in a number of Member States. The findings will be compiled in a study, on a number up to 10 countries. In addition the project will develop an ETF toolkit to offer an overview of the most common problems bus and coach drivers are confronted with, and guidance on best trade union responses.

The project will offer ETF member organisations the opportunity to compare and evaluate the collected data, to take stock of best practices and further implement them in their own country, mindful of the specificities of their national industrial relations. The ETF toolkit will enable them to increase the coverage of their CLAs and engage with the sector and operators in complementing policies and agreements.

### 3. Reasons for contracting out the implementation of the work

Expertise will be needed in delivering the two outcomes of the project: Outcome 1) study on market trends and on collective labour agreements in 10 selected Member States; Outcome 2) development of a toolkit to include an overview of the main problems drivers are confronted with; varying from pay issues to aspects relating to quality of work and life, and guidance on how to address these problems, based on the best practices and examples identified in the study. Having in view the complexity of the task and the number of Member States to cover by the study, the ETF will need to work with 2 experts. **This call refers to expertise I: Social Conditions in Bus and Coach Transport in Europe. Development of an ETF toolkit to guide trade unions' responses.**

### 4. Tasks to be performed by the external expert

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

Tasks	Competencies
Compiling a toolkit to offer an overview of the most common problems bus and coach drivers confront with, and guidance on best trade union responses (CLA, sector and company policy agreements)	Experience in developing synthetical tools for trade union and workplace use  Experience in labour and industrial relations issues
Contributing with draft documents/tools to 3 country-specific workshops	Cooperation contacts in different European countries and/or personnel with relevant European language skills
Delivery of final product in a structured and synthetic manner, and an easy to read style	Experience in writing in an easy and understandable style, appropriate for union officials and activists  Capacity to present information in a structured and well-articulated manner



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Cooperation and exchange with expert 1 in this project, who will draft the study	
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The planned schedule for the project activities is the following:

- 1<sup>st</sup> Project steering group meeting: 16/3/2021, Zoom
- 1<sup>st</sup> Workshop: 22- 23/06/2021, Zoom
- 2<sup>nd</sup> Project steering group meeting: 15/09/2021, Zoom
- 2<sup>nd</sup> Workshop: 6- 7/10/2021, Prague (tbc)
- 3<sup>rd</sup> Workshop: 16-17/11/2021, Rome (tbc)
- 3<sup>rd</sup> Project steering group meeting: 2/02/202, Stockholm (tbc)
- Final conference: 15/03/2022 (tbc), Brussels (tbc)

### **Guidance and indication on tasks execution and methodology**

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

## **5. Expertise required and profile**

The tenderer shall have experience in social science and public relations and shall prove her/ his expertise with examples of her/ his work. The contract will only be awarded to tenderers who 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 developing target-specific toolkits for trade union use;
- 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 40 days from March 2021 until **March 2022**, including attending 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 in **March 2022**.



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## 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 within one month after the signing this contract
- 35 per cent after the assessment by the 3<sup>rd</sup> project steering group meeting
- 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 **24,000.00 EUR** (without travels, hotel and subsistence costs).<sup>1</sup>

# Part II – The tendering procedure

## 1. Selection criteria:

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

Criterion	Description	Value
Price	Best value for money	30 per cent
Quality and expertise	Proven expertise in: <ul style="list-style-type: none"> <li>- communication</li> <li>- developing of didactical materials</li> <li>- industrial relations</li> <li>- knowledge of labour legislation</li> <li>- change management</li> </ul>	40 per cent
Approach	Structured and open approach	20 per cent
Ability to write and speak in clear and concise English		10 per cent
<b>TOTAL</b>		<b>100 per cent</b>

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



## 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 1. 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.

## 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

European Transport Workers' Federation ETF  
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**Deadline for the offer: 26 February 2021**



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