

Brussels, 16 April 2021

## **CALL FOR EXTERNAL EXPERTISE**

### **DEVELOPING TRANSPORT WORKERS' EXPERTISE FOR FAIR TRANSPORT AND STRONG UNIONS (VS/2021/0030)**

#### **Pillar 3- developing trade union response and engagement in the climate action**

#### **1. Background**

In order to stay relevant for the workers, trade unions need to stay up to date with ongoing policies, as well as with industrial and technological developments. This is especially true in the transport sector, where on one hand we see social issues caused i.a. by the misuse and misinterpretation of the Posting of Workers Directive, and on the other hand, the relevance of climate change and the urgent need to 'green' the transport modes. Furthermore, developments in logistics require urgent trade union responses.

The social shortcomings of the transport sector became especially visible in the context of the COVID-19 pandemic, with logistics heavily impacted. In addition, the political discussion on the post-Covid recovery gives high priority to decarbonization and a green transformation of the European economy, including the transport sector.

This is why the ETF is conducting an EU funded project that addresses the above-mentioned issues, with the aim of equipping its affiliates with know-how and practical tools that they can use in their everyday work at national and local level. The aim is to strengthen the unions and to foster their cooperation at the European level.

The overall ETF project is based on four pillars. This specific pillar is dealing with the topic of climate change and the challenge of 'greening the transport sector, sustainable transport, the transition to a climate-neutral transport system', as proposed in the European Commission's Green Deal for Europe and the DG Move Sustainable and Smart Mobility Strategy.

The ETF is looking for an external expert who will perform desktop research and compile an "ETF Transport Trade Unions' Climate Action Toolkit" including modules on collective bargaining, political campaigning & lobbying and workers' representation. The draft Toolkit will be subject to a "reality check" during five events dedicated to individual transport modes and to equality. Subsequently, the expert will integrate the feedback from these events into the text and compile a final version that will be presented at a final event dedicated to strategic questions.

The climate pillar aims at:

- informing the ETF affiliates about the different climate policies and approaches relevant for transport as a whole and the different sectors;
- creating an understanding of the impact of climate change and of climate policies on their sector and work places;
- organising an exchange of good practices between the ETF affiliates regarding union activities dedicated to this topic;

- developing a trade union toolkit based on concrete examples that aims to promote trade union involvement in the climate action.

The following - not exhaustive - questions should be addressed: how to anticipate change, how to prepare for discussions with the employer and how to safeguard workers' rights, how to campaign for a fair transition.

The project is addressed to trade union representatives from the different transport modes, trade union officials and works council members.

## 2. Purpose of the Contract

The external expert is required due to specific expertise needed in “climate policies and industrial relations” and organisational constraints within the ETF.

## 3. Tasks to be performed by the expert

### 3.1 Description of tasks

The expert has to perform the following tasks:

- Desk-top research: Collecting information on the impact of climate change and the impact of climate policies on the different transport sectors and on transport work places (anticipating change);
- Presenting the policies and the possible impact in a “pedagogical way”, using visuals and other tools;
- Collecting good practice examples of trade union climate actions with a specific focus on collective bargaining, political campaigning & lobbying and workers’ representation
- Participating in and preparing the program, speakers and content for 6 workshops by using interactive tools;
  - 4 sector related workshops: waterborne transport modes (maritime, ports, inland waterways, fisheries), aviation, road transport and public transport (rail and urban public transport);
  - 1 horizontal workshop on climate policies and equalities;
  - 1 strategic workshop (summarising the discussions, strategic outlook)
- Drafting the workshop reports;
- Drafting a practical and hands-on tool for trade union representatives, an “ETF Transport Trade Unions’ Climate Action Toolkit” for trade union strategies and actions to address climate change and the impact of climate policies;
- Testing the toolkit in the workshops;

The content of the toolkit will be specified with the climate pillar project manager on the suggestion of the expert.

### 3.2 Guidance and indications on tasks execution and methodology

Concrete guidance will be given by the steering committee of the overall project and the project manager for the climate pillar, during implementation.

#### **4. Expertise required**

The tenderer shall prove their expertise with examples of their 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)
- sound background in industrial relations and trade union campaigning
- expertise in communication
- knowledge on climate change and climate change policies and their potential impact on workers and trade unions
- expertise in developing didactic materials and conducting interactive workshops
- extensive writing skills
- experience in change management
- respect of budgetary constraints
- knowledge of the transport sector is an asset

The expert can be an individual, an organization or a consortium made up of several entities.

#### **5. Time schedule and reporting**

The expert will be asked to work between 65 to 75 days as proposed in the experts work plan and methodology. The expert is expected to work for the project from May 2021 (signature of the contract) until February 2023, including attending six dedicated events. Travel, accommodation and subsistence costs for journeys will be reimbursed according to EU rules.

A preliminary breakdown of working schedule may be as follows:

<b>PREPARATORY</b>		
Research, collecting good practice examples, drafting of material for the workshops, preparation of the 1 <sup>st</sup> workshop		from signing of the contract till 1 <sup>st</sup> action
1 <sup>st</sup> draft of a tool-kit to be tested in workshops		
<b>IMPLEMENTATION</b>		
Climate workshop 1 Waterborne transport sectors	Stockholm 1,5 days	Month 7

Climate workshop 2 Public transport: rail and urban public transport	Vienna 1,5 days	Month 11
Climate workshop 3 Road transport	Bucharest 1,5 days	Month 13
Climate workshop 4 Aviation	Dublin 1,5 days	month 16
Climate workshop 5 Equalities	Rome 1,5 days	Month 20
Regular adaptation of the tool-kit including the input from the workshops and the feedback on the draft		
Climate workshop 6 Strategies	Bruxelles 1,5 days	Month 22
<b>FOLLOW-UP</b>		
Finalising the trade union tool-kit		Month 22 - 23

(month 1 is March 2021)

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

## 6. 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 signing of the contract;
- 35 per cent after the organisation of three workshops;
- 35 per cent after the completion of the work.

A standard contract template can be received upon request.

## 7. Price

The maximum budget available (covering all taxes, including VAT<sup>1</sup>) is **43.500 EUR**. This amount does not include travels, hotel and subsistence costs that will be covered by the ETF separately.

## 8. Selection criteria related to the financial and technical capacity of the bidders

A proof of sound finances can be requested by the bidder.

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<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

## 9. Award criteria related to the quality of the bids received

The contract will be awarded to the tenderer whose offer represents the best value for money - taking into account the following criteria:

Criterion	Description	Value
Quality and expertise	Proven expertise in: - communication - developing of didactical materials - industrial relations - climate change and climate policies - change management	50 per cent
Approach, clarity	Structured and open approach	30 per cent
Ability to write and speak in clear and concise English		20 per cent
TOTAL		100 per cent

It should be noted that the contract will not be awarded to a tenderer who receives less than 70% on the Award Criteria.

## 10. Content and presentation of the bids

### a) Content of the offers

The offer must indicate how candidates meet the criteria listed above, as well as indicate the total price of the consultancy.

#### *Individual candidates*

In case of offers submitted by individual candidates, a CV should be attached.

#### *Organisations*

In case of offers 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.

References should also be provided.

#### *Joint tenders*

A joint tender is a situation where a tender is submitted by a group of economic operators (natural or legal persons). Joint tenders may include sub-contractors in addition to the members of the group. In case of joint tender, all members of the group assume joint and several liabilities towards ETF for the performance of the contract as a whole, i.e. both financial and operational liability. Nevertheless, tenderers must designate one of the economic operators as a single point of contact (the leader) for ETF, for administrative and financial aspects, as well as operational management of the contract.

After the award, ETF will sign the contract either with all members of the group, or with the leader on behalf of all members of the group, authorised by the other members via powers of attorney.

b) presentation of the offers

The offers, including a CV, must be sent by e-mail to: Sabine Trier at [s.trier@etf-europe.org](mailto:s.trier@etf-europe.org)

c) deadline

The deadline for offers is on **Monday, 10 May 2021**.

