

Brussels, 06/09/2022

## CALL FOR EXTERNAL EXPERTISE

**Strengthening the capacity of workers' organisations to address  
social challenges in land transport in Europe  
Project 101048319**

**Call for tenders II: Addressing social challenges in rail transport**

### 1. Background

European land transport goes through key changes and challenges. Key in this mix are: the European Union Green Deal, the Just Transition Mechanism and the Smart and Sustainable Mobility Strategy. As transport was strongly hit by the pandemic, the EU Recovery and Resilience facility will also influence policy choices. Here, Member States have requested EU financial aid to allegedly support the development of climate friendly modes. In addition, platform economy is gaining ground and will certainly lead to unprecedented changes in urban mobility. All this will have a strong social and labour impact. The ETF role is to ensure that social and labour dimensions are part of these processes and policies. Building capacity among its members, to constructively participate in these processes, will be key in balancing social and climate goals and achieve a post-covid, more sustainable, land distribution of transport modes.

This project enables the ETF to achieve the above by a two-tier approach: a sector specific one (road, rail, urban public transport – UPT - and platform economy), feeding into a holistic approach, covering land transport. The project will benefit all ETF member organisations, beyond the EU geographical coverage and will require a complex methodology and thus, external expertise (3 experts to work on the road, rail and the UPT pillars). The expert work would be enriched by input from the ETF member organisations, via a series of 8 workshops.

The project is overseen by a Project Steering Group, who equally undertakes the task to develop political content and strategy relating to an ETF land transport vision.

The final conference of the project will tap into this dimension, putting across the ETF vision for a socially sustainable land transport in Europe.

With financial support from the European Union





## 2. Purpose of the Contract

The external expert is needed to perform the scientific research work of the rail transport work package. The ETF does not have the necessary human resources to implement this requirement accordingly.

The focus of the rail work package is: **The impact of liberalisation on working conditions in the rail sector.**

The objectives of the rail work package is on the one hand to gain a better understanding of the effects of different policy approaches (liberalisation vs integrated systems) on working conditions (exact coverage to be decided with the project steering group) in the sector.

An additional objective is to support national trade unions in identifying gaps in CBA coverage, notably in private undertakings, and to develop strategies to defend rights for all railway workers.

All in all, this will allow ETF and its affiliates to make evidence-based policy recommendations on the topics described above.

## 3. Tasks to be performed by the expert

The rail transport work package will be based on research into the development of working conditions in the sector. The research will primarily consist of collecting cases from ETF affiliates, employers, policy makers and other stakeholders through a combination of desk research and targeted interviews.

This research will be accompanied by two workshops: one at the start of the project to kick-start the research and to collect examples of the effects of different policy approaches on working conditions. A second workshop will be organised towards the end of the project to present the findings to stakeholders and policy makers.

The specific aspects of working conditions covered by the research will be identified by the Project's Steering Group. The results will be presented in a publication and a factsheet.





### 3.1 Description of tasks

The expert has to perform the following tasks:

- Draft a report of 20 pages based on
  - desk research
  - collection of examples
  - qualitative interviews (9 interviews in 9 countries).
- Participation in 2 workshops and 1 Final Conference

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

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

## **4. Expertise required**

The tenderer shall prove his/her expertise with examples of his/her 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);
- Experience in drafting studies in social science;
- Experience in 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;
- Knowledge of the transport sector;
- Respect of budgetary constraints.

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





## 5. Time schedule and reporting

Work package as in the grant agreement	Topic	Date	Planned number of days
Task 3.1	Order and contract with contractor	Oct. 2022	0,5
Task 3.2	Conducting secondary scientific research on working conditions in the rail sector	Oct. 2022-May 2023	5-6
Task 3.2	Developing an interview guideline (questionnaire) and running targeted interviews with the trade unions from the 9 pre-selected Member States	Oct. 2022-May 2023	12
Milestone 3	Draft report interim research results	April 2023	8-10
Task 3.3	Participation Workshop 1 (online)	Feb/March 2023	2
Task 3.4	Participation workshop 2 (Croatia, tbc)	Sept. 2023	2
Deliverable 3.1	Draft final report	Oct. 2023	8-10
Task 6.1	Participation final Conference, Brussels	December 2023	1
			Total 38,5-43,5

## 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 Milestone 1: Draft report interim research results;
- 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 **35,000.00 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.

## 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:

Criteria	Description	Value
Price	Best value for money	30 per cent
Quality and expertise	Proven expertise in: - scientific research work - social science - industrial relations - labour legislation - knowledge of the transport sector	40 per cent
Approach	Structured and open approach	20 per cent
Ability to write and speak in clear and concise English		10 per cent

<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



TOTAL	100 per cent
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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:

Jedde Hollewijn at [j.hollewijn@etf-europe.org](mailto:j.hollewijn@etf-europe.org).

c) deadline

The deadline for offers is on **Friday, 30 September 2022, 12:00hrs.**

