

Brussels, 27 April 2021

## CALL FOR EXTERNAL EXPERTISE

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

Pillar 2- Logistics

### 1. Background

In order to stay relevant for the workers, trade unions need to be up to date with the ongoing policy, industry and technological developments. It 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 the urgent need to 'green' the transport modes. In addition, some transport sectors, logistics in this case, experience significant expansion while trade union coverage in the sector remains low, which effectively limits the social dialogue.

The shortcomings of the transport sector became especially visible in the context of COVID-19 pandemic, when i.a. posted workers suffered from unclear rules on applicable labour and social laws, and logistics workers worked under extreme pressure to satisfy increased demand, while being highly exposed to health risks.

This is why the ETF will be developing a project on 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. It will strengthen the union capacity to deal with changes, and will foster their cooperation at the European level.

The project is based on four pillars: building legal expertise on posting of workers in the EU and strategies for trade union involvement in addressing its shortcomings, mapping the logistics sector and establishing an organising strategy, developing trade union response and engagement in the climate action, and finally, trade union study visits.

In order to deepen the knowledge of the ETF affiliates, the first three pillars will be implemented with the involvement of external experts. The fourth pillar will be based on the exchange of good practices between the ETF's largest affiliates and young trade union representatives from the countries with lower trade union coverage. Each pillar will allow for creating networks of the ETF affiliates.

The logistics pillar of the action has in turn the goal of mapping the sector in Europe, its main players and issues with the aim of providing the ETF a tool to creating organising strategies and establishing cooperation between the ETF affiliates interested in this field. It therefore aims eventually to strengthen the social dialogue and collective bargaining in the sector.

The pillar on logistics will be implemented through a set of four meetings of a group composed of the union representatives that are active in the logistics sector, or are willing to organise its workers. In order to provide an overview of the sector of Europe, its main players and issues, an external expert will be engaged to do the research. The expert will participate in the meetings and inform the discussions.

## 2. Purpose of the Contract

The external expert is needed due to limited in-house specific expertise, by the ETF, in terms of research and analysis of such a vast sector as logistics.

## 3. Tasks to be performed by the expert

### 3.1 Description of tasks

The expert has to perform the following tasks:

Task	Description
Task 1	Compiling sector-based overviews on logistics for the following: land transport, aviation, water sections, by leading targeted interviews with the ETF heads of departments and key affiliates with relevant experience
Task 2	Prepare discussion documents for 3 sector-based workshops and manage the workshop debates, content-wise
Task 3	Following each sector-based workshop, update and upgrade the discussion documents into sectoral approaches on logistics
Task 4	Keep track to cross-sector synergies occurring along the process, and based upon these, and upon the outcome of the sector-based workshops, prepare a report illustrating a broad, cross-sector ETF approach on logistics
Task 5	Prepare the final cross-sector logistics workshop, lead the content part of the workshop and process the outcome in the final pillar report
Task 6	Present a full-fledged report on logistics in transport to the ETF, doubled by policy recommendations

The report will include a company-based case studies (company to be identified by the Project Management Team).

The entire work of the expert will focus on a set of aspects covering: business models, social and labour issues and future trends - to be established in detail by the Project Management Team.

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

As already indicated above, the expert will be working under the close guidance by the project management team, and the project manager for the logistics pillar.

#### 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)
- sound background in transport and logistics
- expertise in developing user-friendly discussion documents and conducting interactive workshops
- extensive writing skills
- respect of budgetary constraints
- capacity in report writing (easy to read reporting) and capacity in developing a basis for policy recommendations

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 50 days, spread out to cover the all phases of the project. The expert is expected to work for the project from May 2021 (signature of the contract) until February 2023, to include attending four dedicated events. In as much as direct meetings will be possible, travel, accommodation and subsistence costs for journeys will be reimbursed according to EU rules.

A preliminary breakdown of working schedule may be as follows:

<i>Responsible staff &amp; expert</i>	<i>Detailed description</i>
<b>PHASE 1: Preparation</b>	
Project Management Team (PMT), relevant ETF members of staff & selected expert	✓ Plan the expert work throughout the duration of the project
<b>PHASE 2: Execution</b>	
Expert, under the guidance of the relevant ETF member(s) of staff	✓ Execute Tasks 1 to 5 as described above
<b>PHASE 3: Follow-up and reporting</b>	
Expert, under the guidance of the relevant ETF member(s) of staff	✓ Execute Task 6 as described above

## 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 the 3<sup>rd</sup> workshop;
- 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 €30,250 (thirty thousand two hundred and fifty euro). This amount does not include travels, hotel and subsistence costs that will be covered by the ETF separately in case direct meetings are organised.

## 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:

Criterion	Description	Value
Quality and expertise	Proven expertise in: <ul style="list-style-type: none"><li>- transport and logistics</li><li>- developing user-friendly discussion documents</li><li>- developing an reader-friendly / user-friendly report and a sound base for ETF policy recommendations in the designated policy area</li></ul>	50 per cent
Approach, clarity	Structured and open approach	30 per cent
Language	Ability to write and speak in clear and concise English	20 per cent
TOTAL		100 per cent

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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

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: **Cristina Tilling** at [c.tilling@etf-europe.org](mailto:c.tilling@etf-europe.org)

### c) Deadline

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

