

Brussels, 17 December 2024

**CALL FOR EXTERNAL EXPERTISE**  
**Trade Unions for Better Public Transport (TU4BPT)**  
**Project No. 101192196**

Phase 1: Development of Guidance and Training Materials on trade union advocacy for better  
Public Transport

**1. Background**

The urban public transport sector faces a severe worker shortage exacerbated by the COVID-19 pandemic. Passenger numbers have rebounded, but employment levels remain critically low, impacting service and work quality and hinder expansion goals vital for a sustainable modal shift. This project aims to address these challenges by developing guidance and training materials that empower workers and their organizations to engage effectively with these issues and promote quality work. This can be through social dialogue and more broadly to advocate for a fair transition in public transport in the context of workforce shortages and the twin (green and digital) transition and sustainable urban mobility planning.

**2. Purpose of the Contract**

The project will have two external experts, the first expert will be required to develop the written training/guidance material and a second expert who will be responsible for providing training workshops based on training/guidance material. The second expert will be sought at the same time as this call. **We welcome applications for both roles but this call is specifically for an expert with expertise in industrial relations, work shortage and twin transition who can develop training material.** This contract seeks to engage external expertise to design, develop, and produce training/guidance materials. These materials will be used to deliver training in the second phase of the project. Previous public transport research experience would be an advantage but is not a requirement.

**3. Tasks to be performed by the expert**

3.1 Description of Tasks

The expert will be required to lead on all tasks in Phase 1: 'Development of Training and Guidance Material'

These will include:

- Research and identify key issues of affiliates and stakeholders
- Study union and employer responses to the worker shortage and twin transition and identify the use or potential use of Just Transition principles
- Engage with stakeholders and affiliates to identify/develop concepts and best practices
- Identify real-world best practice solutions in responding to worker shortage and twin transition from urban public transport or other relevant sectors



- Conduct interviews and consultations with affiliates and stakeholders to inform material.
- Regularly report progress to the Project Steering Group and other events as required
- Develop a 2-page scoping **Short Guidance Document** in English to identify and narrow key areas of focus
- Draft 30-page **Comprehensive Training Materials** based on research, best practices, and stakeholder input.
- Manage handover from phase 1 of the project to phase 2 “Implementation and Training”

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

The external expert will be working under the guidance of and in close cooperation with the Project Steering Group and in particular the Policy Officer for Urban Public Transport and Head of Land Department of the ETF.

#### 4. **Expertise Required**

The tenderer shall prove his/her expertise with examples of his/her work. The contract will be awarded to tenderers that can prove they can fulfil the following criteria:

- Excellent command of written and spoken English
- Proven experience in developing advocacy and training materials for workforce organizations.
- Sound knowledge of industrial relations, labour market trends and twin transition
- A deep understanding of the principles and values of trade unionism.
- Knowledge of EU policy around urban mobility
- Knowledge of twin transition concepts
- Knowledge of public transport is an asset
- Respect for budgetary constraints

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

#### 5. **Deliverables and Timeline**

The project aims to start on February 3, 2025 with Phase 1. Phase 2: Implementation and Training will commence in September 2025 and run until December 2026. The following reporting deadlines and milestones will apply:

- **First Steering Group Meeting:** February 19, 2025
- **Short Guidance Document:** Delivered by March 31, 2025
- **Comprehensive Training Materials:** Draft by June 30, 2025 final version by August 15, 2025
- **Second Steering Group Meeting: September 10, 2025**
- **Interviews and Consultations:** Scheduled as needed throughout the project.
- **Third Steering Group Meeting: Q1, 2026**
- **Closing Steering Group Meeting Q4, 2026**





## 7. Payment Terms

Payments will be structured as follows:

- 30% upon contract signing.
- 35% upon submission of the draft materials.
- 35% upon project completion and validation of content by steering group and approval of final deliverables.

A standard contract template can be received upon request. The maximum budget available (covering all taxes including VAT<sup>1</sup>) is **18,648 EUR along with 3,700 EUR** to co-ordinate project steering group meetings

## 8. Selection Criteria

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

Criterion	Description	Value
Price	Best value for money	20%
Quality and expertise	Proven expertise in: <ul style="list-style-type: none"><li>- Proven experience in developing advocacy and training materials for workforce organizations.</li><li>- Excellent command of written and spoken English</li><li>- Sound knowledge of industrial relations, labour market trends and twin transition</li><li>- A deep understanding of the principles and values of trade unionism.</li><li>- Knowledge of EU policy around urban mobility</li><li>- Knowledge of twin transition</li><li>- Knowledge of public transport is an asset</li><li>- Respect for budgetary constraints</li></ul>	40%
Approach, clarity	Structured and open approach	30 %
Language	Ability to write and speak in clear and concise English	10 %
TOTAL		100 %

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

<sup>1</sup> Services delivered from outside of Belgium are subject to Belgian 21% VAT which must be considered as part of the total price





## 9. Content and presentation of the bids

### 9.1. 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.

### 9.2. Presentation of the offers

The offers, including a CV, must be sent to Conor Farrell, Policy Officer for Urban Public Transport at [c.farrell@etf-europe.org](mailto:c.farrell@etf-europe.org).

### 9.3. Deadline

The deadline for offers is Friday 24th January 2025

