



Brussels, 02/02/2023

CALL FOR EXTERNAL EXPERTISE

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

Call for tenders III: Addressing social challenges in urban public transport

1. Background

European land transport goes through key changes and challenges. This is a policy-driven process, aim at setting EU transport priorities along climate goals, while catching up with latest developments on technology, market and business models. 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.

2. Purpose of the Contract

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

The focus of the urban public transport work package is: **Trends in urban mobility and the engagement of trade unions.**

Three main areas shall be analysed:

a) Public Transport (PT) in the context of current trends in urban mobility

- on-demand service integration, ride hailing, MaaS
- (potential) impact on regulatory frameworks, on working conditions in PT & on CBAs

b) Financing for resilience in UPT sector: Which financing/ownership models ensure resilience and are best for workers?

- The role of social dialogue / on a sample of 6-8 countries with fair regional balance i.e. AU, BE, DE, FR or ES, RO, BG, HU, LIT; desk research, targeted interviews;
- Financing practices, to make public transport more resilient and realise potential to increase users to meet climate objectives;
- Their (potential) impact on UPT workers & on social dialogue (here, the 'KIP' will be the CBA coverage and its evolution over a chosen period of time to include pre and post pandemic years);
- Remarks and conclusions on the attractiveness of the sector for younger workers, based on the findings re the above.

c) Role of trade union advocacy in urban mobility planning: good/bad practices, recommendations for trade unions engagement; policy recommendations

- A collection of examples of trade union action undertaken at national level vis-à-vis point a & b above;
- How can trade unions influence the creation of Sustainable Urban Mobility Plans (SUMP).

3. Tasks to be performed by the expert

3.1 Description of tasks

The expert has to perform the following tasks:

- Report of 20 pages based on
 - desk research
 - qualitative interviews (in 6-8 countries with stakeholders)
- Participation in 2 workshops
- Participation in 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;

- Knowledge of the legal framework and the ability to reproduce the contents in a comprehensible manner;
- 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 4.1	Order and contract with contractor	Oct. 2022	0,5
Task 4.2	Conducting secondary scientific research on the legal framework	Oct. 2022-May 2023	5-6
Task 4.2	Developing an interview guideline (questionnaire) and running targeted interviews with the stakeholders from 6-8 countries	Oct. 2022-May 2023	8-10
Milestone 4	Draft report interim research results	April 2023	8-9
Task 4.3	Participation Workshop 1 (online)	Jan/Feb 2023	2
Task 4.4	Participation workshop 2 (Poland, tbc)	May/June 2023	2
Deliverable 4.1	Draft final report	Sept. 2023	7-8
Task 6.1	Participation final Conference, Brussels	December 2023	1
			Total 33,5-38,5

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 2: 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 VAT¹) is **30,000.00 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
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

¹ services delivered from outside of Belgium are subject to Belgian 21 per cent VAT which must be considered as included in the total price

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:

Conor Farrell at c.farrell@etf-europe.org.

c) deadline

The deadline for offers is on [Friday, 30 September 2022, 12:00hrs.](#)

