Brussels, 1st February 2018

Tender Specifications for subcontracting external expertise

Project Title and number:
Ensuring the mental wellbeing of ICT employees in the new world of work – revising the Good Work, Good Health Guidelines (VS/2017/0366)

1. Background

UNI Europa has been awarded a grant from the European Commission to launch a project called “Ensuring the mental wellbeing of ICT employees in the new world of work – revising the Good Work, Good Health Guidelines”.

Brief description of the project

The ICT sector has always been at the forefront of technical developments, both in providing support for other industry sectors as well as in terms of using new technology within their own businesses. Consequently, the ICT workforce has been among the first to experience the benefits but also the challenges of these changes that not only involve the use of modern technology and equipment, but often also leads to important changes in the work organisation. New forms of work organisation such as telework or ICT-based mobile work that can be beneficial for workers’ work-life management can at the same time blur the boundary between professional and private life. The potential for employees to be available due to an advanced technology has led to borderless work with often increased work load and working time that may put additional pressure on the workforce. Moreover, the increasing competition within the European ICT sector but also with global ICT players has led many companies to relocate or restructure their activities (e.g. by outsourcing or near-/offshoring jobs) and to use new forms of work organisation and contracts that all heavily impact on the ICT workforce. Facing these different developments – rapid technical change, the threat of redundancies and relocations, new work organisation – many European ICT workers experience a feeling of job insecurity, stress and increased workload.

The social partners in the ICT sector, UNI Europa and ETNO, have been observing the increase of work-related stress and psychosocial risks for a long time. This is why they had carried out a project on mental health in the telecom sector in 2009 already. The “Good Work Good Health” Project (VS/2009/0162) aimed at improving the mental wellbeing of workers in the telecom sector by defining good practice. Within the framework of this project, a report was drafted that identified good practice based on a systematic evidence review and interviews within companies. The findings of the report were fed into the project’s key outcome, namely the “Good Work Good Health Guidelines”. These guidelines highlighted good practice examples and provided concrete recommendations for employers and employees on how the mental wellbeing at the workplace could be improved.

In the light of the rapid technological changes and the evolution of the ICT sector during the last years, ETNO and UNI Europa feel that it is necessary to review and update the “Good Work Good Health Guidelines”. Though the essence of the Guidelines is still valid, it seems necessary to review the mental wellbeing of ICT workers in the evolving world of work and analyse any new psychosocial risks that have emerged since 2009. A review of the Guidelines should go beyond the research results of the former project and analyse any new elements in the modern world of work that may impact on the mental health of employees. This includes the evolution and widely spread use of ICT-based mobile work, flexible working time, the use of KPI’s etc. Furthermore, the appearance of new forms of work such as platforms and crowd work should be addressed, as well as the tendency towards virtual
management and self-management (the exact scope of the research will be defined by the Steering Group). All these factors heavily impact on the working conditions and therefore the wellbeing of workers. These elements can both represent new opportunities but also a new level of psychosocial risks. The revision of the Guidelines should also incorporate best practice examples from companies and workers’ organisations in the ICT sector addressing mental health in the new world of work: e.g. policies on the right to disconnect, agreements on mobile work, initiatives to prevent stress and burnout etc.

In order to collect the material for updating the Guidelines, the project partners will commission an external expert. The expert would have to review the existing literature regarding the newly emerged psycho-social work hazards and elements of work that impact on mental wellbeing. In addition to the desktop research, the external expert should as well examine recent policies and initiatives in companies and workers’ organisations affiliated to ETNO and UNI Europa that can be added as best practice on the newly identified issues. Moreover, he/she should - in coordination with the project steering group – elaborate the revised version of the Guidelines.

Project Timeframe

Project duration: 01/12/2017-31/05/2019

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<th>Timeline</th>
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<td>23/01/2018</td>
<td>Brussels</td>
<td>Planning meeting</td>
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<td>By end of February 2018</td>
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<td>Recruitment of external expert</td>
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<td>Months 3-4 (Feb-March 2018)</td>
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<td>Desktop research</td>
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<td>Months 5-7 (April-June 2018)</td>
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<td>Preparation of questionnaire, interviews with companies, collection of best practice</td>
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<td>Months 8-10 (July-Sept 2018)</td>
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<td>Month 10 (27/09/2018, tbc)</td>
<td>(tbc)</td>
<td>Steering group meeting with experts</td>
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<td>By month 11 (Oct 2018)</td>
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<td>Final version of Guidelines</td>
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<td>Months 11-13 (Oct-Dec 2018)</td>
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<td>Lay-out and production of all linguistic versions of the Guidelines</td>
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<td><strong>Main Event</strong></td>
<td>Month 14 (17 January 2019, tbc)</td>
<td>(tbc)</td>
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<td><strong>Follow up phase</strong></td>
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Project coordination group and external expertise

The project steering group is composed of representatives of both ETNO members and UNI Europa affiliates representing a wide geographical breadth. The members of the steering group all have a profound knowledge of the sector, especially of health and safety matters, and of cooperation at European level. The steering group will meet three times during the project and will support the implementation of the project activities and will take all the necessary decisions to ensure the achievements of the objectives of the project, evaluation of the activities and dissemination of the results. Moreover, the steering group will be in regular contact by conference call. The working language of the steering group is English. The external expert is expected to liaise closely with the steering group.

2. Purpose of the Contract

To review and update the existing “Good Work, Good Health Guidelines” it is necessary to gather information on any newly emerged psychosocial risks and benefits and to collect best practice examples in the target companies. The project contains funding for the commissioning of two researchers to undertake the desk and field based research and the elaboration of the revised Guidelines. The researchers will be required to liaise with UNI Europa and ETNO staff and the project steering group and also attend the project steering group meetings and main event to present the research findings. The two researcher roles are:

- Project Manager/Senior Researcher
- Consultant/Junior Researcher

3. Tasks to be performed by the contractor

3.1. Description of tasks

Tasks involved:

The tasks of the external expert are to

- Carry out a desktop research to identify any new psycho-social work hazards and elements of work that tend to promote mental wellbeing that should be included in the review of the “Good Work Good Health” Guidelines (months 3-4)
- Prepare a questionnaire for UNI Europa and ETNO affiliates based on the research results and conduct interviews in selected companies with management and employee representatives to identify best practices on mental wellbeing at work (months 5-7)
- Based on the research findings and the identified best practice, elaborate a draft version of the new Guidelines to be presented to the steering group by month 10 (followed an agreed format, ensuring the information is complete, relevant and up-to-date), to be finalised by month 11
- Participate in the steering group meetings and the project workshop; liaise regularly with the steering group via email and conference calls

3.2. Guidance and indications on tasks execution and methodology

During each stage of the project, the contractor will work in close collaboration with the project steering group composed of both UNI Europa and ETNO representatives. Based on the grant agreement of the European Commission, ETNO and UNI Europa will give guidance on tasks and methodology as required.

4. Expertise required

The successful contractor will be required to demonstrate knowledge and expertise in the following areas:
• A sound understanding of European social dialogue
• Good understanding of the ICTS sector and its development and challenges in Europe, especially in the context of digitalisation
• Good knowledge and experience of the issue of mental wellbeing at work and psychosocial risks, challenges and benefits at the workplace
• Experience of writing high quality reports, specifically for European projects
• A record of other similar work
• A proven ability to present to a social partner audience

5. Time schedule and reporting

According to the grant agreement of the European Commission, the timetable looks as follows: The project is scheduled to run for 18 months, between December 2017 and May 2018. We anticipate choosing the successful external expert application by the end of February 2018 in order to start the research phase immediately.

Overview:

Preparatory Phase
• By end of February 2018: Recruitment of external expert
• Months 3-4 (Feb-March 2018): Desktop research
• Months 5-7 (April-June 2018): Preparation of questionnaire, interviews with companies, collection of best practice
• Months 8-10 (July-September 2018): Drafting of the revised Guidelines
• Month 10 (27/09/2018): Steering group meeting with experts
• By month 11 (October 2018): Final version of Guidelines

Main Event
• Month 14 (17 January 2019): Project workshop

Follow up phase
• Month 16 (19 March 2019): Follow up meeting with experts

Meeting dates will be changed and deadlines to be observed by the contractor will be fixed by the project steering group. The contractor will be informed about these changes as soon as possible.

6. Payments and standard contract

The payments for this work will be made as follows:

• 30% upon signing the contract.
• 40% upon the production of the finalised Guidelines in October 2018.
• 30% upon presentation of the final Guidelines at the Project Workshop in January 2019.

7. Price

The maximum price will be 34 400 Euros (VAT included) for this work, in the proposal bid entailing funding for the commission of a Project manager/senior researcher and Consultant/junior research, details outlined below. The below price includes the daily cost and number of days that each researcher will work on the project, however applicants are free to suggest an alternative allocation, whilst keeping within the 34 400 Euro budget, if they so wish.

• Desktop research phase:
  Project manager: 2 days * 1000 € = 2 000 €
  Consultant: 6 days * 800 € = 4 800 €
• Development of questionnaire, interviews in selected companies, collection of best practice:
  Project manager: 4 days * 1000 € = 4 000 €
  Consultant: 9 days * 800 € = 7 200 €

• Drafting of the revised Guidelines:
  Project manager: 3 days *1000 € = 3 000 €
  Consultant: 10 days * 800 € = 8 000 €

• Participation at two steering group meetings and the workshop:
  Project manager: 3 * 1000 € = 3 000 €
  Consultant: 3 * 800 = 2 400 €

Travel and accommodation costs will be covered by means of the project’s budget by UNI Europa, according to the European Commission’s reimbursement rules (economy class for air travel, first class for train travel, taxi costs are not reimbursed).

8. Selection criteria

The work will be awarded to the contractor that best meets the following criteria:

• Their expertise knowledge and experience in the areas mentioned under point 4
• Their record of producing similar guidelines
• Their track record demonstrating experience of supporting similar projects

9. Award criteria

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

- Proposed methodology
- Evidence of experience in working in similar projects
- Report writing and presentation
- Best coverage of EU countries (experience, languages etc.)

10. Presentation of the bids

Interested parties must submit their proposals to the Director for ICTS at UNI Europa (address below) in a sealed envelope as well as per email to birte.dedden@uniglobalunion.org.

The tender representing best value for money will be selected. If there are two or more selected then invitations to attend a selection panel will be sent to the appropriate tenderers. The invited tenderers will then be expected to meet with the project coordinators for further discussions.

Interested parties should send their tender as soon as possible, but no later than 17:00 on Friday 23\textsuperscript{rd} February 2018, to:

UNI Europa

c/o Birte Dedden
Rue Joseph II, 40
1000 Brussels
Belgium