

Call for Tender for subcontracting external expertise

UNI Europa EU-funded project

“STAFF - Supportive tools for ambitious fair franchising”

Project number: VS/2023/101143470

1 Purpose

UNI Europa is seeking external experts for three different workstreams of the new project “STAFF - Supportive tools for ambitious fair franchising”:

- **Workstream 1:** we are looking for a researcher who will draft a **report** including (1) a **research** to identify underlying risks for workers and examples of good practices related to franchising in the commerce sector across Europe, and (2) **guidelines** for trade unions in best dealing with franchising.
- **Workstream 2:** we will contract an external **facilitator** to support the design and facilitation of the two sectoral workshops and the final conference. Engaging an experienced facilitator will help UNI Europa to better conceive the thematic workshops using the appropriate tools and a participatory methodology to run the meetings and focus on meaningful and quality-oriented discussions. The facilitator should encourage the exchange of good practices
- **Workstream 3:** we are looking for a **policy expert** who, on the basis of the research and guidelines produced during the Workstream 1 and the outcomes of two workshops with UNI Europa national affiliates, will draft policy recommendations on “ambitious fair franchising” in the commerce sector.

The selected experts will report back to the project Steering Group and will carry out their work under the supervision of project coordinator UNI Europa, and in dialogue with all the project Steering Group members.

It is possible to submit proposals to one or more workstreams of the project.

This call will be open from Monday 29 April 2024 for four weeks. The deadline for submission of bids is on Monday 27 May 2024 at noon (12:00).

Date of publication: 29-04-2024

Submission of bids: 27-05-2024 (12:00 CET)

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2 Context

2.1 Project context

UNI Europa Commerce is running the two-year EU funded project “STAFF - Supportive tools for ambitious fair franchising” (project number: 101143470), starting in March 2024. The project focuses on franchising as this is one of the most escalating trends among big retailers. The project aims at looking into what would constitute ambitious and fair franchising from the employees’ point of view. The project will contribute to empower trade unions in anticipating, reacting and responding to the challenges linked to franchising. This will be done by running a research on working conditions in franchised workplaces in the commerce sector, establishing criteria to assess when franchising can be considered fair, identifying provisions referring to franchising in legislation and collective agreements, as well as by drafting guidelines for trade unions on how to address the risk of deterioration of working conditions associated to franchising, also in combination with the twin transition.

Two workshops will be organized for UNI Europa commerce affiliates. Through the support of a facilitation expert, participants will become familiar with the outcomes of the research and the guidelines, share best practices and provide further input for the drafting of policy recommendations.

The policy recommendations will be drafted by a policy expert in order for UNI Europa to initiate a discussion with policy makers, employers’ organizations and other relevant stakeholders on the impact of franchising on workers in the commerce sector and on the possible need for regulation. The policy recommendations will be presented at the project final conference.

2.2 UNI Europa

UNI Europa is a European trade union federation based in Brussels, which represents 270 trade unions with more than 7 million members throughout Europe. UNI Europa’s strategy is to build power for working people through strong unions and collective bargaining. We work towards a social Europe with quality jobs and fair working conditions for everyone. We promote and advocate workers and trade union interests towards EU institutions and multinational companies. UNI Europa is part of UNI Global Union.

This project is run by UNI Europa commerce, which is the voice of national trade unions representing workers in the commerce sector across Europe.

2.3 Overall project time schedule

| Month | Main activity | External experts involved |
|--|---|---|
| Month 1 (March 2024) | Project start | |
| Month 4 (June 2024) | Participating and presenting in steering group meeting n.2 | Research expert |
| Months 4-15 (June 2024-May 2025) | Drafting research and guidelines | Research expert |
| Month 9 (November 2024) | Participating and presenting in steering group meeting n.3 | Research expert |
| Months 9-13 (November 2024-March 2025) | Two focus groups meetings with UNI Europa affiliates | Research expert |
| Month 14 (April 2025) | Participating and presenting in steering group meeting n.4 | Research expert Policy expert |
| Month 15 – 19 (May-September 2025) | Participation, facilitating and presentation of research in two workshops | Research expert Policy expert Facilitation expert |
| Month 18 (August 2025) | Participating and presenting in steering group meeting n.5 | Research expert Policy expert |
| Months 19-22 (September-December 2025) | Drafting of policy recommendations | Policy expert |
| Month 22 (December 2025) | Participation, presenting and facilitating at project conference | Research expert Policy expert Facilitation expert |
| Month 24 (February 2026) | Project end | |

3 Workstream 1 – Research and guidelines

3.1 Objectives

The workstream 1 has as objective to draft a **report** including two components::

- **a research:**
 - the expert will collect information about franchising in the commerce sector, across Europe, focussing on its impact on working conditions. The research will identify underlying risks associated with franchising, through the comparison of working conditions, including trade union rights, for franchised and not-franchised workers
 - the expert, in coordination and with the support of the Project coordinator, will run two “focus groups” (in presence, in Brussels) with UNI Europa commerce affiliates to collect input for the research and identify specific cases of franchising. The focus groups will serve as a confirmatory research technique
 - the expert will analyse the findings on the basis of a set of evaluation criteria developed in cooperation with the project Steering group. The analysis will lead to an assessment of what can be considered as “fair franchising”. Best practices, if any, will be singled out
 - the expert will identify references and provisions referring to franchising and working conditions within: EU legislation; national legislation in EU-Member States; collective agreements at sectoral and company level in the commerce sector across Europe; global framework agreements of companies in the commerce sector operating in EU

- **guidelines:**
 - based on the assessment, the expert will develop guidelines for trade unionists on what would constitute “fair franchising” in the commerce sector. The guidelines will serve to establish basic principles and a common understanding and awareness of what “fair franchising” should look like, how the risks of deterioration of working conditions can be addressed and how the possible negative impact of the twin transition on franchised workers can be reduced. The guidelines should also propose safeguards and clauses for collective bargaining and social dialogue to protect workers from potential negative consequences of franchising and/or reduce the difference in terms of rights and working conditions between employees in not-franchised and franchised branches of the same company.

3.2 Task description and timing

For the **research**, the specific tasks for the expert are:

- Initial desk research leading to a proposal for overall approach;
- In cooperation with the project Steering group, discuss and finalize criteria that allow for the analysis and assessment of identified franchising cases, with the aim of providing a basis for the definition of “fair franchising”;
- Desk research: collect information on working conditions in franchised workplaces in the commerce sector across Europe. Gather information on the impact of franchising on workers. In addition, identify references and provisions referring to franchising (EU legislation; national legislation in EU-Member States; collective agreements at sectoral and company level in the commerce sector across Europe; global framework agreements of companies in the commerce sector operating in EU
- Run two focus groups with selected UNI Europa affiliates: explore the key issues for selected franchising cases to limit the scope of the research and to focus on relevant information. The two focus groups will take place in presence, in Brussels
- Prepare the draft structure of the research, present and discuss it with the Steering group
- Prepare the draft research and implement feedback of at least two review rounds;
- Prepare the final research collating research findings and assessment: digital publication, in English only, 20 pages (including executive summary).

For the **guidelines**, the specific tasks for the expert are:

- Initial drafting of the guidelines leading to a proposal for approach and contents;
- Prepare the draft guidelines, present and discuss them with the Steering group
- Prepare the final guidelines: digital publication, in English only, 4 pages.

The **final report**, including the **research** and the **guidelines**, should be finalized by May 2025.

The specific timing for the above mentioned tasks will be agreed by the expert with the Project coordinator.

The expert will later **present** the report (research and guidelines):

- At two workshops organized by UNI Europa commerce (May – September 2025)
- At the project final conference (October 2025)

The expert will **attend** relevant project Steering group meetings (online attendance can be an option).

3.3 Payments and standard contract

The payments for this work will be made as follows:

- 30% upon signing the contract (month 4 – June 2024);

- 40% following the mid-term evaluation of the project (month 12 – February 2025);
- 30% upon presentation of the report at the final conference (month 22 – December 2025).

3.4 Price

The maximum price for this workstream will be **60,000 EUR, VAT included**. The expert is expected to organise all project related travel and accommodation themselves and to cover the costs through this budget.

3.5 Selection and award criteria

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

Selection criteria:

- Excellent English speaking and writing skills

Award criteria:

- Quality and relevance of the proposed methodological approach in terms of (1) literature collection, (2) analysis and (3) result presentation;
- Expertise, knowledge and experience in the areas of research;
- Experience in working with trade unions;
- Record of producing similar reports;
- Record demonstrating experience of supporting similar projects.

4 Workstream 2 – Facilitation

4.1 Objectives

UNI Europa will contract an external facilitator to support the design and facilitation of **two sectoral workshops and the final conference**. Engaging an experienced facilitator will help UNI Europa to better conceive the thematic workshops using the appropriate tools and a participatory methodology to run the meetings and focus on meaningful and quality-oriented discussions. The facilitation expert should encourage the exchange of good practice, learning and training among participants.

4.2 Task description and timing

For the **two workshops**, taking place between May and September 2025 (precise scheduling to be defined), the facilitation expert is expected to:

- Support the Project coordinator in the preparation and organisation of the two sector workshops (agenda, speakers, follow-up, debriefs);
- In cooperation with the Project coordinator, liaise with speakers and prepare workshop agendas, including the presentation of research findings and guidelines by the external researcher (see: Workstream 1) and harvesting for the further elaboration of policy recommendations by the policy expert (see: Workstream 3);
- Prepare and facilitate the two sector workshops. Both workshops will be one-day events and take place in-presence. The workshops will be organised for a group of about 25-30 people, with interpretation, will take place in different European cities (not in Brussels)

For the project final conference, planned in December 2025 (precise scheduling to be defined), the facilitation expert is expected to:

- Support the Project coordinator in the preparation and organisation of the final conference (agenda, speakers, follow-up, debriefs);
- In cooperation with the Project coordinator, liaise with speakers and prepare conference, including presentation of research findings and policy recommendations by the experts;
- Propose and run facilitation in a way that the conference is for participants an opportunity for networking and capacity building;
- The conference is a one-day event and takes place in-presence, in Brussels. The conference will be organised for a group of about 70 people, with interpretation.

4.3 Payments and standard contract

The payments for this work will be made as follows:

- 30% upon signing the contract (month 4 – June 2024);
- 40% following the mid-term evaluation of the project (month 12 – February 2025);
- 30% upon facilitation of the final conference (month 22 – December 2025).

4.4 Price

The maximum price for this workstream will be **11,000 EUR, VAT included**. The expert is expected to organise all project related travel and accommodation themselves and to cover the costs through this budget.

4.5 Selection and award criteria

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

Selection criteria:

- Excellent English speaking and writing skills

Award criteria:

- Expertise, knowledge and experience in the topic;
- Experience in working with trade unions;
- Record of facilitating similar workshops and conferences;
- Record demonstrating experience of supporting similar projects.
- Proposed methodology for facilitation and moderation;
- Demonstrated ability to think creatively & ability to reduce complexity of research for communication to a wider audience.

5 Workstream 3 – Policy recommendations

5.1 Objectives

A policy expert is needed to draft the policy recommendations on “ambitious fair franchising”. She/he should attend the two thematic workshops to gain an understanding of the various challenges and demands of workers regarding franchising in the commerce sector across Europe. Based on the research findings and the guidelines drafted by the research expert (see: Workstream 1) and the outcomes of the two workshops (see: Workstream 2), the policy expert should then closely cooperate with the steering group to elaborate the policy recommendations on “ambitious fair franchising” in the commerce sector: the document will present the position of UNI Europa Commerce on how to improve fairer conditions for workers in franchised companies in the commerce sector and it will serve as a base to initiate discussions with policy makers, employers’ organizations and other relevant stakeholders on the impact of franchising on workers and the possible need for regulation. The policy recommendations should also provide a basis for a future-proof definition of “fair franchising” and they will be disseminated across UNI Europa network and among relevant industry stakeholders, thus feeding into activities of trade union at global, EU and national level.

The policy recommendations will be presented at the project final conference.

5.2 Task description and timing

The policy expert is expected to:

- Attend relevant steering group meetings (online attendance can be an option);
- Attend the two workshops with UNI Europa commerce affiliates. The workshops are one-day in-presence meetings, organised for a group of about 25-30 people, with interpretation; they will take place in different European cities (not in Brussels). During the workshops, the policy expert will have the opportunity to become familiar with the project activities and to collect input for the policy recommendations. The provisional period when the workshops will be held is May – September 2025;
- Draft policy recommendations based on the research findings and the guidelines, as well as the outcomes of the two workshops: 4 pages in English (digital format).

- Prepare and deliver a presentation of the policy recommendations at the project final conference in Brussels. The conference is a one-day event and takes place in-person, in Brussels. The conference will be organised for a group of about 70 people, with interpretation. The provisional period when the conference will be held is December 2025.

5.3 Payments and standard contract

The payments for this work will be made as follows:

- 30% upon signing the contract (month 4 – June 2024);
- 40% following the mid-term evaluation of the project (month 12 – February 2025);
- 30% upon presentation of the final version of the policy recommendations and the final conference (month 22 – December 2025).

5.4 Price

The maximum price for this workstream will be **5,000 EUR, VAT included**. The expert is expected to organise all project related travel and accommodation themselves and to cover the costs through this budget.

5.5 Selection and award criteria

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

Selection criteria:

- Excellent English speaking and writing skills

Award criteria:

- Expertise, knowledge and experience in the topic;
- Experience in working with trade unions;
- Record of producing similar documents;
- Record demonstrating experience of supporting similar projects;
- Proposed methodology;
- Evidence of experience in working in similar projects.

6 Procedure and presentation of the bids (for all workstreams)

It is possible to submit proposals to one, two or all workstreams of the project.

Interested parties must submit their proposals no later than **Monday 27 May 2024 (12:00 CET)**
to: Ilaria Costantini, UNI Europa Commerce project coordinator

ilaria.costantini@uniglobalunion.org

The selection process will be completed by mid June 2024.