



Tender Specifications for Subcontracting External Expertise for the project
“Mapping the situation of social dialogue in the commercial live performance sector”

Contract number VS/2019/0014

1. Background

The European social partners in the live performance sector have launched a project to map and assess the situation of social dialogue in the commercial live performance sector which remains largely unmapped in a significant number of EU countries. This project will focus on five countries in Central and Eastern Europe: Czech Republic, Bulgaria, Romania, Serbia, and Poland.

As underlined in the 2016 EAEA-PEARLE* joint Paper on *the prime role of culture and the arts in society*, public funding and the primary role of State support are key for the live performance sector. In many EU countries, key cultural institutions are either fully publicly funded or combine funds from public and private sources. According to information that is currently available, there are very few examples in Central and Eastern Europe where public and private money are combined to sustain cultural institutions or undertakings. Rather, there is a clear distinction between public and commercial sectors. However, while information on how the public sector is organized is available everywhere, information on how the commercial side of the sector is set up is lacking in most of the countries from Central and Eastern Europe. Previous project work points to a situation where employers are not very organized in the commercial sector of these countries and as they are not organized, they do not easily reach out to workers’ representatives. Therefore, sectoral social dialogue is believed to be at a very low level. In addition, culture and labour ministries have very little statistical and qualitative information about the role played by social partners in this part of the live performance sector of their own country.

As public funding has suffered damaging cuts all over Europe, private income has become more important to the sector. It is therefore crucial to map the state of social dialogue in the sector, particularly in those countries where we lack basic information on the situation and encourage the setting up of a dialogue between the commercial sector employers and workers where it does not exist.

The aim of the action is to identify the key players and to describe the commercial sector, to research the state of social dialogue in the commercial live performance sector in these countries, to understand the possible obstacles to the sectoral social dialogue and to look at ways to improve the situation. The main focus of the project will be a study, which will be conducted through desk-research, field research in each project country, and focus groups and interviews. The project will be coordinated by a lead researcher, and the field research will be implemented by a local researcher in each project country. The lead researcher will coordinate and guide the work of the field researchers and eventually compile the data into a single research report.

The project will also allow us to establish contact with organisations with whom we currently have no contact, such as employers' or workers' organisations who operate in the sector. If such organisations do not exist yet, we hope that employers and workers from the commercial sector will find a source of inspiration from the project work to look towards creating a body which will represent them.

2. Purpose of the Contract

The purpose of this contract is to subcontract the work of *lead researcher*, to realise the research "Mapping the situation of social dialogue in the commercial live performance sector". The research work at national level in the five project countries will be implemented by a local researcher in each project country. The lead researcher will guide and supervise the work of the local researchers, will liaise with the project Steering Committee, and will eventually compile all the collected data into a final report and present the report in the final conference.

3. Tasks to be performed by the Contractor

3.1 Description of tasks

The lead researcher will be responsible for the following tasks:

- Guiding the national research: The lead researcher will guide and supervise the work of the five local researchers.
- Implementing the focus groups: Together with the local researchers, the lead researcher will organise and participate in each national focus group meeting.
- Working together with each local researcher to compile the national data into a comprehensive report on the situation.
- Attending the regional conference: The lead researcher will attend the regional conference and work with the local researchers to include further national and regional input into the research.
- Drafting and presenting the final report: The lead researcher will compile all the information gathered by the local researchers and provided further by the regional conference and draft a final report.
- Attending the final conference: The lead researcher will present the final report at the final conference.
- Attending project Steering Committee meetings: The lead researcher will attend the four scheduled Steering Committee meetings to discuss and report on the progress of the research.

3.2 Guidance and indications on tasks execution and methodology

The lead researcher will be contracted on a freelance basis and will work under the direction of the Project Secretariat. The Project Steering Committee will advise the lead researcher on execution and methodology of the mapping throughout the contract period. The Project Secretariat will be facilitating this process and assist the lead researcher where necessary. The lead researcher will report to the Steering Committee and the Project Secretariat on a regular basis.

4. Expertise required

The lead researcher must have proven previous experience in carrying out cross-European surveys, adequate legal expertise, strong analytical and communication skills to be able to fully understand the specific national contexts in the commercial live performance sector and present the outcomes of the survey in a clear and comprehensive way.

5. Time schedule and reporting

The contract starts on 1.4.2019 and ends on 30.11.2020.

The total number of days for which the researcher will be contracted is 30.

The provisional timeline for activities is:

- April 2019: The lead researcher attends the Steering Committee meeting to plan for the activities and to finalize the research methodology.
- 1 April – 31 July 2019: The local researchers implement the desk-research. The aim of the desk-research is to assess the existing information on the status of social dialogue in each of the project countries, to collect baseline information, and to define the framework for each country. The lead researcher will closely monitor and guide the work of each local researcher to ensure the consistence of methodology and the comprehensiveness of the data collected.
- 1 August 2019 – 28 February 2020: The focus group meetings and individual interviews take place. The lead researcher plans and implements these events together with each local researcher and participates in each focus group meeting.
- November 2019: The lead researcher presents the progress of the mapping to the Steering Committee
- March – October 2020: The lead researcher compiles all the information and data gathered during the desk-research, the focus groups and the interviews, and drafts a final report, as well as an executive summary.
- April 2020: The Steering Committee and all the researchers take stock of the information that was acquired from the focus groups and individual interviews. The Steering Committee and the lead researcher discuss the final report and agree on the format.
- May 2020: Regional conference takes place. The lead researcher attends and works with the local researchers to include further national and regional input into the research.
- August 2020: The lead researcher presents a draft version of the final report to the Steering Committee and discusses the finalization of the report.
- October: The lead researcher submits the final version of the final report to the Steering Committee.
- November 2020: The lead researcher presents the findings of the mapping (the final report) to the final conference.

6. Payments and standard contract

The research expert will be carrying out the study under the framework of a standard honorary agreement with the project coordinator, UNI Europa (EURO-MEI).

Payments will be made after receipt of invoice. The expert will send an invoice covering 30% of the price immediately after the signing of the contract (April 2019). He/she will send an intermediate invoice covering 30% of the price after presenting the draft version of the study to the Steering Committee (August 2020). The final invoice of the remaining price is due after the sending of the finalised amended version of the research (October 2019).

7. Price

The maximum price is EUR 19 500, - overheads and VAT included.

8. Selection criteria related to the financial and technical capacity of the bidders

The Project Steering Committee will jointly appoint the research expert on the basis of the following selection criteria: level of expertise (expertise requirements mentioned under point 4), coherence of methodology and the price.

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:

- Level of expertise
- Coherence of methodology

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

10.1 Content of the bids

Tenderers are required to submit a CV and references with respect to earlier studies carried out. The tender will contain a study outline including a detailed draft work schedule on the basis of the project work programme.

10.2 Presentation of the bids

The bids are to be presented on A4 format and to be submitted to UNI Europa (EURO MEI) by post and email before **15 March 2019** to the attention of Mr. Johannes Studinger, Head of UNI MEI, 40, rue Joseph II, 1000 Brussels, Belgium; email: johannes.studinger@uniglobalunion.org