



## TENDER SPECIFICATIONS FOR SUBCONTRACTING EXTERNAL EXPERTISE

*Promoting Health and Safety at Work in Journalism through Training & Social Dialogue*

Date of Publication	<b>05 October 2021</b>
Deadline to respond	<b>01 November 2021</b>

This is a call for subcontractors to provide external expertise within the framework of the EU project “Promoting Health and Safety at Work in Journalism”.

The EFJ will publish this tender on the EFJ website ONLY, from Monday 05 October 2021, and the deadline for submission of bids is Monday 01 November 2021.

### 1. THE EUROPEAN FEDERATION OF JOURNALISTS

The European Federation of Journalists (EFJ) is the largest organisation of journalists in Europe, representing over 320,000 journalists in 72 journalists’ organisations across 45 countries.

The EFJ was created in 1994 within the framework of the IFJ Constitution to represent the interests of journalists’ unions and associations and their journalists. It has established an independent legal status (number: 0503.985.472) as an international non-profit association (AISBL, association internationale sans but lucratif) since February 2013 according to the Belgian law.

The EFJ fights for social and professional rights of journalists working in all sectors of the media across Europe through strong trade unions and associations. The EFJ promotes and defends the rights to freedom of expression and information as guaranteed by Article 10 of the European convention on human rights.

The EFJ supports its affiliates to foster trade union development, to recruit new members, and to maintain or create environments in which quality, journalistic independence, pluralism, public service values, and decent work in the media exist.

The EFJ is recognised by the European Union and the Council of Europe as the representative voice of journalists in Europe. It has registered with the EU Transparency Register (No. 27471236588-39). The EFJ is member of the Executive Committee of the European Trade Union Confederation (ETUC).

The European Federation of Journalists represents via its affiliates, journalists' unions and professional journalists in 72 journalists' organisations across 45 countries. They include: Armenia, Austria, Albania, Azerbaijan, Belarus, Belgium, Bosnia-Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Faroe Islands (DK), Finland, France, Georgia, Germany, Great Britain, Greece, Hungary, Iceland, Ireland, Italy, Kosovo, Latvia, Lithuania, Luxembourg, Malta, Montenegro,

The Netherlands, North Macedonia, Norway, Poland, Portugal, Romania, Russia, San Marino, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Turkey, Ukraine.

To find out more information about EFJ, consult <https://europeanjournalists.org/>

## 2. PROJECT BACKGROUND

### 2.1 Introduction

The EFJ is currently implementing the project entitled *Promoting Health and Safety at Work in Journalism through Training & Social Dialogue* as part of the Information and training measures for worker's organisations programme of the European Commission's Employment, Social Affairs and Inclusion Directorate General.

The subcontracted experts' contract will start in November 2021.

In the framework of this call, the EFJ expresses its intention to select a subcontractor to carry out specific components of this project.

The tender specifications included in this document detail the background, tasks, price, and selection criteria and procedures regarding the award of a contract to the selected subcontractor.

### 2.2 Context

Journalists and media workers have always been considered "high risk" workers because of the nature of their work. The reality showed that there is an inadequacy in both the awareness of health and safety issues and the lack of protective measures and policy in place for journalists and media workers.

With the nature of the news industry where speed is the rule to break the news, there is barely time to carry out risk assessments for journalists. However, journalists face omnipresent risks to their health and safety, whether in the workplace or in more dangerous or volatile environments.

Since 1990, 371 journalists and media workers have lost their lives on assignment.

The COVID-19 pandemic crisis has exposed such a gap and confirmed that the health and safety of essential workers like journalists are ever more important. There is an important role for trade unions to ensure the health and safety of workers, who are often under pressure to perform work in an unsafe environment without adequate protection or policy in place. Many unions in Europe representing essential workers, that include journalists, have stepped up to ensure the health and safety of workers during the pandemic.

Where does the duty of care lie? Who is responsible for the health and safety of journalists? How can journalists achieve work-life-balance in an increasing digital age producing 24-hour news? How can journalists' unions and associations help these anxious workers? There is a need for coordinated efforts through social dialogue among workers' and employers' organisations to ensure the health and safety of journalists.

## 2.3 Objectives of the project

The project has the overall objectives to:

- promote health and safety at work in journalism through training of workers' organisations and engagement in social dialogue with employers' organisations;
  - address all aspects of the health and safety challenges as a result of the changing working environment in journalism as a result of digitalisation in the media;
  - create a comprehensive and universal risk assessment model to be used by journalists and media companies;
  - create a culture of safety in the newsrooms and among journalists;
  - address vulnerable workers in the journalism industry on gender specific violence and harassment at work such as female journalists and those vulnerable workers such as freelance journalists .
- In order to create a culture of health and safety, this can only be achieved through social dialogues and cooperation with relevant actors, journalists, journalists' unions and employers organisations.

The expected results of the project will be:

- Raised awareness among journalists, journalists' unions and employers' organisations the need to secure health and safety at work in the media.
- Improved social dialogues at both national and European level on the issues of health and safety at work among journalists' unions and employers organisations.
- Empowered journalists' unions to improve the health and safety of journalists and their working conditions through collective bargaining, provision of training and other services.
- Exchanged of best practices on measures to improve the health and safety of journalists and media workers at different levels from personal protection training, trade unions and in media companies.
- Provided practical support through training to vulnerable workers in the journalism industry on gender specific violence and harassment at work such as female journalists and those vulnerable workers such as freelance journalists.

## 2.4 Methodology

The project has a strong focus on the online/digital element through the development of an online risk assessment platform for journalists and media workers, as well as journalists' unions and media employers. The online platform will be accompanied by an online handbook with modules (with case studies, best practices examples, physical safety and digital safety) for further online training targeting primarily journalists, union trainers and media employers.

The digital materials and online handbook will have a long lasting effect and can be updated as it evolves. It also goes beyond the geographical limitation of the target audiences which will have wider and spillover effect.

A survey will also be conducted among journalists' unions and employers organisations to map out the need and the roles and responsibility on the health and safety of journalists and media workers. This will be used as an awareness raising campaign.

In addition, training activities will be organised in Croatia, Germany, Sweden, France and the Netherlands taking into account the geographical coverage and the needs and development of national partners in this area. The training will make use of the resources in the online platform and the online modules/training. These trainings will also allow the testing of the online platform to its relevance.

In a broader approach, the project will involve stakeholders beyond the journalism sectors, extending to the audio-visual and cultural sector to involve trade union representatives such as the actors (FIA), musicians (FIM) and technicians (UNI-MEI).

The final conference in Brussels will gather the above-mentioned stakeholders to widely publicise the online platform and handbook, raising awareness and gathering commitment.

## 2.5 Activities

1. Survey on journalists' perceptions of health and safety issues
2. Online risk assessment platform
3. Online handbook with five modules (case studies, best practices, physical safety and digital safety)
4. Five trainings will be organised in Croatia, Germany, Sweden, France and the Netherlands
5. Final conference in Brussels

Provisional Calendar of Activities		
Start date	End date	Type of event
15/11/2021	01/02/2023	Development of project webpage and Online Risk Assessment Tool, Online training modules
09/02/2022	10/02/2022	Training 1
09/02/2022	10/02/2022	Steering Group meeting 1
16/03/2022	17/03/2022	Training 2
09/05/2022	10/05/2022	Training 3
20/09/2022	21/09/2022	Training 4
03/11/2022	04/11/2022	Training 5
03/11/2022	04/11/2022	Steering Group meeting 2
24/02/2023	25/02/2023	Final conference Launch of online risk assessment tool Launch of safety handbook with training modules

## 2.6 Description of project partnership

This project is solely managed by the EFJ together with five affiliated entities consisting of national journalists' unions and associations in Croatia (Trade Union of Croatian Journalists, TUCJ), Germany (German Journalists Union, DJV), France (National Journalists Union CGT, SNJ-CGT), the Netherlands (Dutch Journalists Association, NVJ), and Sweden (Swedish Journalists Association, SJF) and their

respective national employers organisations. The five organisations listed above are part of the Project Steering Committee (SC) and will provide expertise for the project components, participate in SC meetings and the EU-level conference in Brussels.

The EFJ is responsible for the management of subcontracted expertise.

### **3. PURPOSE OF THE CONTRACT**

The tender aims at finding a subcontractor to carry out the implementation of parts of the project activity.

In order to ensure a large visibility for this tender, the European Federation of Journalists published the tender specifications on its website. The tender will remain online for the duration of the bidding procedure.

### **4. TASKS TO BE PERFORMED BY THE CONTRACTOR**

The subcontractor should provide the following services for the applicant organisations:

#### **Steering Committee Meetings (2 Meetings)**

A project Steering Group consisting of 5 members of the national partners and the EFJ provides expertise and contribute to the planning and evaluating the project and organising the main events. The members include the EFJ secretariat, representatives of the 5 national partners and will include the subcontracted safety expert. The Steering Group will meet three times during the course of the project. The group will also evaluate all activities. Regular telephone conferences and at least two video conferences (ZOOM) and email exchanges will also take place among the project Steering Group.

#### The tasks to be performed by the subcontractor

- Participation in steering committee meetings (physical and online)
- Present the results and key issues on the tasks assigned to the subcontractor including intermediary results
- Provide expertise for the implementation of the project's other components

Travel costs and subsistence will be covered by the EFJ for these meetings

#### **Risk Assessment Platform**

The Online Risk Assessment Platform will be the first of its kind for journalists and media workers. It will allow journalists and their employers to prepare their assignments and deployment by undergoing a risk assessment for their upcoming tasks including threat modelling to better prepare for the unexpected. The platform will address specific problems faced by journalists in terms of physical and digital safety and will address both the workers and the employers to cover what each party has to do to complete the job they are assigned to do in a safe manner. It will become an important training tool for journalists' unions and associations as well as media employers' organisation to further conduct their own trainings.

The risk assessment platform target groups are all types of journalists as well as journalists' unions and media employers

The risk assessment platform will consist of

- An online risk assessment system to be displayed on an electronic platform
- The risk assessment tool should be designed and developed as a step by step approach to building the risk assessment and threat model report to ease the user's experience
- Several modules should be included in the tool including: personal information, medical information, employers information, insurance information, training information and equipment Information
- The tool should include a detailed assessment of the threat for each mission
- The tool should include pre-defined and automated suggestions for putting in place countermeasures including on equipment, communication protocols and insurance requirements.
- The platform should be relevant for both employees of media organisations as well as for freelance workers.
- The tool shall be universal enabling journalists to conduct their risks assessment for their assignments and stories in Europe and beyond

#### The tasks to be performed by the subcontractor

##### *Preparation Research*

- to propose a methodology for the preparatory phase coherent with the description of the project and its aims (above);
- to present a preliminary draft of the structure of the risk assessment tool
- Desk research and mapping study gathering data
- The methodology is to be considered a work in progress throughout the project. The subcontractor may need to revise it following the discussions with the Steering committee

##### *Content Production*

- Setting-up of specific modules of information for the risk assessment tool (as per above description)
- Identification and categorisation of the different risks to be included in the risk assessment tool
- Identification of a risk-level system for the risk assessment tool
- Identification and production of countermeasures and contingencies for each risk and associated levels of risks
- Production of checklists (medical, travel, communication) to be included as part of the risk assessment system
- Design and lay-out of a Word or equivalent self-generated risk assessment document available for download for further use and input by users

##### *Technical Terms of Reference*

- Prepare a technical document (Terms of Reference) specifying the structure, the methodology and content to be displayed for the technical infrastructure including the logical sequence of events (step by step approach) and the relationships between levels of risks and associated contingency measures
- Include the specifications and draft template for the generated WORD version of the Risk assessment prepared by users

### *Technical Testing/Supervision*

- Supervise the work of the technical developer to ensure quality standards of the technical infrastructure in line with the specificities listed above
- Testing of the draft platform to correct bugs, problems including the relationships between risks and contingency measures

### *Deployment and Implementation*

- Assist in the deployment of the risk assessment platform including its visibility
- Assist EFJ in presenting the tool at the final conference and workshops

There is a maximum of 75 days forecasted to accomplish this task

### **Online Modules**

The online platform will be coupled with a dedicated online handbook and training modules that can be used for further training activities. This is a necessary step in a continuing evolving and dynamic environment. The situation of today can change drastically and an online handbook and modules will allow to respond rapidly to changing threats such as in the case of the COVID 19 crisis. The modules will be made freely available online to everyone in four languages (English, French, Serbo-croatian, and German).

### The tasks to be performed by the subcontractor

#### *Preparation Research*

- to propose a methodology for the preparatory phase coherent with the description of the project and its aims (see above);
- to present a preliminary draft of the structure of the handbook and online modules
- Desk research and mapping study gathering data
- Collect examples of best practices (and less successful practices, where relevant) and integrate it within the preliminary draft structure.

#### *Content Production*

- Provide expert content for the production of an online safety handbook for journalists to be displayed on the Platform including text, visuals and infographics
- Produce 4 Online Modules for training purposes to accompany the handbook to be displayed on the platform including text, audio, video, image materials
- The four modules to be produced are:

Module 1 - Gender Safety

Module 2 - Protests and demonstration

Module 3 - Digital Security and Harassment

Module 4 - Freelancers

- Production of checklists to accompany the online handbook and modules

### *Technical Terms of Reference*

- Prepare a technical document (Terms of Reference) specifying the structure, and content to be used and displayed for the development of the technical infrastructure (in the form of a website)

### *Technical Testing/Supervision*

- Supervise the work of the technical developer to ensure quality standards of the technical infrastructure in line with the specificities listed above
- Testing of the draft platform to correct bugs and issues related to the produced content

### *Deployment and Implementation*

- Assist in the deployment of the platform including its visibility
- Assist EFJ in presenting the tool at the final conference and workshops

There is a maximum of 40 days forecasted to accomplish this task

In addition, the subcontractor will be in charge of the technical development and lay out/design of the online modules. As part of the Tender, there will be a total of maximum 1000€ per module (4000€ in total) for the technical development and a maximum of 1000€ per module (4000€ in total) for the lay-out and design of the modules.

Translations of the modules are the responsibility of the EFJ.

### **Training for Journalists**

A series of 4 two-day training for 20 participants involving national and European journalists unions / associations and employers' organisations on the risk assessment tool will be provided in the pilot countries in Croatia, Germany, France, and Sweden. Two trainings will be national focused (Germany, France) while the training in Croatia, and Sweden will be regional.

The training programme will be organised by the EFJ members and affiliated entities.

These trainings will target journalists, editors', media managers, journalists' unions and associations' representations.

### The tasks to be performed by the subcontractor

- Design and prepare an agenda for each workshop including the presentation of the risk assessment tool including its methodology, content and the logical approach
- Deliver the training agenda as designed
- Training should include hands on sessions for the participants to familiarise with the risk assessment system
- Deliver further training sessions on subject of interests for the affiliated entities

There is a maximum of 12 days forecasted to accomplish this task

Travel costs and subsistence will be covered by the EFJ for this activity



## Final Conference

A 1.5 days final conference will be organised in Brussels gathering over 65 stakeholders from all over Europe including journalists, journalists' unions, employers' organisations, policy makers and experts on health and safety to launch the survey result and the online risk assessment tool. The final conference will aim to highlight good practices and gather commitment especially from both unions and employers' organisations to create a culture of health and safety at work in the media. It will involve international experts and representatives from the International Labour Organisations

The subcontractor will participate in the conference to present the risk assessment tool as well as intervene during the debates as panelist in at least one of the sessions.

Travel costs and subsistence will be covered by the EFJ for this activity

## 5. EXPERTISE REQUIRED

Sound experience is required in the following areas:

- Good knowledge and understanding of the training environment in particular for continuous learning and online education
- Demonstrated proven experience of training of journalists, media workers and/or media managers
- Demonstrated proven experience in working with trade unions of journalists
- Successful track record in the media safety industry and proven experience in developing industry standard risk assessments for journalists and media staff
- Demonstrated extensive experience and practise in managing and minimize risks in the field for journalists and media employers (including two letters of recommendations from employers)
- Proven research skills
- Proven writing skills (including reference to past work including publications, articles, etc..)
- High proficiency in English: ability to draft documents and make presentations in English. Knowledge of other languages is a plus;
- Ability to work within specified deadlines and to respect budgetary limits.

The bidder must specify in his/her application whether he/she will work alone or with a team and how many people are in the team. He/she must also send their CV as well as those of any team members. The total amount offered in the tender remains the same even if the bidder works as a team.

## 6. TIME SCHEDULE AND REPORTING

The subcontractor will be asked to work from 15/11/2021 to 28/02/2023. The subcontractor will be responsible for remitting the deliverables foreseen in the project methodology within the above time frame.

## 7. PAYMENTS AND STANDARD CONTRACT

The standard contract with EFJ will cover expertise and technical costs as follows:

Contract with EFJ	
➤ Steering Committee meetings	
➤ Online Risk assessment	
➤ Four Online Modules	
➤ Four Trainings for journalists	
➤ Final conference	
<b>Total budget for the Expertise</b>	<b>€</b>
External Expertise	50,800
Technical Costs	8,000
<b>TOTAL € 58,800</b>	

In accordance with the above table, the subcontractor will enter into a contract with the European Federation of Journalists for a maximum total of € 58,800 (all taxes included).

Upon invoice, the subcontractor will receive the following payments:

1 <sup>st</sup> Installment	2 <sup>nd</sup> Installment	Final Installment
Max 29,400€ (50% of contract) upon signature of contract	Max 17,640€ (30% of contract) upon interim submission of deliverables in the contract	Max 11,760€ (20% of contract) upon final submission of deliverables stated in the contract

Travel and subsistence costs as part of this project will be reimbursed to the subcontractor, in accordance with EFJ's internal rules on project management.

## 8. PRICE

The total maximum budget available for external expertise is **58,800 €** (all taxes included)

## 9. FORM, STRUCTURE AND CONTENT OF THE TENDER

Tenders must be written in English. They must be signed by the tenderer or his duly authorised representative and be perfectly legible so that there can be no doubt as to words and figures.

Tenders must be clear and concise and assembled in a coherent fashion.

Since tenderers will be judged on the content of their written bids, they must make it clear that they are able to meet the requirements of the specifications.

## 10. SELECTION CRITERIA RELATED TO THE FINANCIAL AND TECHNICAL CAPACITY OF THE BIDDERS

All tenders must include at least two sections:

### SECTION A. Technical proposal

The technical proposal must provide all the information needed for the purpose of awarding the contract, including:

1) Specific information covering the technical and professional capacity, as required, in particular:

- Description of relevant professional experience with emphasis on the specific fields covered by the invitation to tender;
- Detailed curriculum vitae of key coordinator and/or possible other team members;
- A selection of the main works and/or articles published by all the experts involved, in relation to the relevant subjects specified in this tender.

2) Specific information concerning the proposed methodology for delivering the tasks listed in section 4 of this document.

#### ii) Financial proposal

Prices of the financial proposal must be quoted in euros, including if the sub-contractor is based in a country which is not in the euro-area. As far as the tenderers of those countries are concerned, they cannot change the amount of the bid because of the evolution of the exchange rate.

The maximum amount available for this contract is EUR **58,800** (all taxes included).

Prices shall be fixed and not subject to revision during the performance of the contract.

## 11. SELECTION CRITERIA

The offers will be examined against the following criteria:

- Verifiable expertise, experience and skills, as required and described above;
- Proven track record of ensuring the quality of materials produced, both in terms of content and format (i.e. previous publications), in the relevant subjects specified in this call for tenders;
- Initial proposal on how to conduct the initial preparatory work and short concept note regarding the methodology for the preparation of the risk assessment platform;
- Price not exceeding the amount stated above;
- Previous research/work undertaken in the field of education of journalists and innovation;

## 12. AWARD CRITERIA RELATED TO THE QUALITY OF THE BIDS RECEIVED

The contract will be awarded to the tender offering the best value for money, taking into account the specific objectives, requirements and selection criteria of the tender. The principles of transparency and equal treatment will be respected with a view to avoiding any conflicts of interest.

## 13. CONTENT AND PRESENTATION OF THE BIDS

### 13.1. Content of the bids

Offers must be received before the deadline of this call for tender by the European Federation of Journalists , i.e. by 01 November 2021 16h00 CET. Offers must be sent to the European Federation of Journalists (see E-mail address below).

### 13.2. Presentation of the bids

Bidders must submit their offer electronically. The subject of the e-mail must include the words *"Tender EXTERNAL EXPERTISE - Promoting Health and Safety at Work in Journalism"*

The Steering Committee of the project will evaluate the tenders. The Steering Committee is formed by EFJ as the coordinator of the project and the five affiliated entities.

One or more members of this committee will initial the documents, confirming the date and time of each bid. The committee members will sign the report on the bids received, which will list the admissible bids and provide reasons for rejecting bids owing to their failure to comply with the stipulations of the tendering process.

This committee will also evaluate the tenders that have been deemed admissible. In case of multiple admissible bids, an evaluation report and classification of participation requests will be drawn up, dated and signed by all the members of the evaluation committee and kept for future reference.

This report will include:

1. The name and address of the contracting authority, the purpose and value of the contract or framework contract;
2. The names of any excluded candidates and the reasons for their rejection;
3. The names of candidates selected for consideration and the justification for their selection;
4. The names of candidates put forward and justification of their choice in terms of the selection or award criteria.

The contracting authorities will then make their decision.

All candidates must address their bid electronically to: [secretariat@europeanjournalists.org](mailto:secretariat@europeanjournalists.org)

The bidders should address their communication to:

[Ricardo Gutierrez](#)  
[General Secretary](#)  
[European Federation of Journalists](#)

END