

## **Call for tenders for subcontracting an expert study in the framework of the ETUC project “Prevention of OSH risks emerging from the dual transitions and at the centre of the EU trade strategy”**

This is a call for a subcontractor to provide expertise in the framework of the implementation of the ETUC project “Prevention of OSH risks emerging from the dual transitions and at the centre of the EU trade strategy”.

The ETUC will publish the call on its website on 20 March 2023. The **deadline for submission of bids is 10 April 2023 at noon (12:00)**.

## **Contents**

1. Context of the expert study: the project “Prevention of OSH risks emerging from the dual transitions and at the centre of the EU trade strategy” .....	2
2. Tasks to be performed by the subcontractor .....	3
3. Expertise, experience and skills required .....	4
4. Time schedule and reporting.....	5
5. Payment .....	5
6. Selection criteria .....	5
7. Form, structure and content of the tender .....	6
8. Award Criteria.....	6
9. Content and selection of the bids.....	7

## **1. Context of the expert study: the project “Prevention of OSH risks emerging from the dual transitions and at the centre of the EU trade strategy”**

### **1.1 Summary and objectives of the project**

The project has 3 main objectives.

1. Develop a European trade union agenda to adapt to the challenges brought by climate change on occupational safety and health.

Employers and trade unions need to deploy joint strategies to prevent the risk that climate change poses to the health and safety at the workplace.

The action will contribute to the formulation of the trade union input to the mentioned strategies. The project will explore some potential measures which have already been pointed out by EU-OSHA and include adaptation of the working schedule to avoid peak hours of heat, closer monitoring of the workers' health conditions, and measures to prevent the psychological impact of the consequences of climate change.

2. Contribute to national strategies to prevent the OSH risks associated to digitalisation.

In the same vein, the project will also seek to pinpoint trade union strategies to tackle the challenge to occupational safety and health presented by digitalisation, with a strong focus on preventive measures which should be implemented with the meaningful involvement of social partners at company and sectoral level. Some of the actions which will be foreseen include the following:

- A strong 'prevention through design' approach that integrates human factors and worker-centred design;
- Collaboration between academics, industry, social partners and governments on research and innovation in digital technologies to properly take account of the human aspects;
- An adapted education system and training for workers;
- The provision of effective OSH services to all workers of the digital world of work.

3. Contribute to the European policy framework on trade with proposals to protect the occupational safety and health of workers.

The importance of labour provisions and social clauses has gained attention in the negotiation of trade agreements. As an example, the European Union require its trading partners to respect and implement the ILO fundamental conventions on labour and occupational safety and health provisions represent a positive move to benchmark. Still, the protection of workers' rights – and more particularly occupational safety and health – remains an area to be properly addressed in the European trade agenda.

Therefore, this project will provide the opportunity for the prioritisation of occupational health and safety provisions at international level through the negotiation of future trade and investment policy and agreements (and the revision of previous ones).

## 1.2 Context of the project

Climate change has detrimental effects on occupational safety health. Global warming, exposure to UV radiation, hazardous weather, are just a few examples. These extreme weather events are expected to increase, thus resulting into more dangerous working conditions.

For workers working outside, high temperatures are particularly dangerous and make the interface with the use of personal protective equipment very difficult. High temperatures can cause dehydration, and other major health problems (including a heart stroke). The drying of European climate is also associated with an increased exposure to silicate dust, especially in agriculture and farming.

Sectors across agriculture, industry and services will need adapt to better prevent the OSH associated risks to these threats.

A previous ETUC project named "Adaptation to Climate Change and the world of work" identified other OSH risks associated with climate change which are associated with rescue workers and workers in the health sector.

Digitalisation can contribute to better working conditions by easing the burden of repetitive tasks, substitute hazardous and arduous jobs with robots and machinery, and contribute to more flexibility in the organisation of work (including working time and the location of the workplace).

Digitalisation may nevertheless also result in increased risks for the safety and health of workers, including ergonomic and safety risks, as well as functional safety risks associated with cybersecurity. There is large agreement on the impact of digitalisation on organisational and psychosocial risks, with an increase in work-related stress and poor mental health. This is particularly associated with increasing performance pressure and work complexity, irregular working hours, less social interaction and support at work, blurred boundaries between work and private life, and the abuse by digital labour platforms of bogus self-employment.

Trade agreements can provide for good outcomes in terms of opportunities for investment and economic growth. However, they can also entail adverse consequences in terms of labour and working conditions (among other externalisations, and not to mention climate and environmental consequences): Lowering work standards and outsourcing of companies to other countries with less labour protections are just two examples.

This project will contribute to the following objectives:

1. Develop a European trade union agenda to adapt to the challenges brought by climate change on occupational safety and health.
2. Contribute to national strategies to prevent the OSH risks associated to digitalisation.
3. Contribute to the European policy framework on trade with proposals to protect the occupational safety and health of workers in both the EU and the respective third country.

## 2. Tasks to be performed by the subcontractor

Given the context outlined above, the subcontractor is required to:

- Develop a methodology for the research and drafting of the report.

- Carry out interviews and/or a survey with project participants and other relevant stakeholders to feed the research.
- Develop **a report, of** between 30 to 50 pages, in English (this means that the document should be finalised in English and require no proofreading). See more information below.
- Participate in project's events, including:
  - The project's Steering Committee meetings and collect inputs and provide updates on the research undertaken;
  - The specific seminar where the report will be presented and discussed with participants;
  - The final Conference and present the final report.
- Work in close coordination with the ETUC project's team throughout the project.

## Report

Undertake research on the occupational safety and health risks associated to the dual green and digital transitions.

The research will look into the risk to the safety and health of workers arising from the digital transition and from climate change and the green transition to mitigate its effects. Besides a general introduction looking at the interplay between these two megatrends and the new risk arising for the safety and health of workers, the research should also map the references to these challenges in the OSH national plans across EU member states.

The reports have to be developed taking into consideration the aims of the project. For this, the subcontractor will work under the supervision and guidance of the ETUC project team and the project's Steering Committee.

### **3. Expertise, experience and skills required**

The drafting of the study requires sound and proven expertise in the following fields:

- Expertise on EU labour legislation, with a focus on the areas of occupational safety and health, industry and environment.
- Knowledge of relevant European-level policies and legislation on the areas of occupational safety and health, industry and environment;
- Experience in working on European level projects;
- Experience in working with trade unions at both European and national level.

Skills required:

- Proven ability to carry out in-depth research on EU issues and understanding links between European and national level;
- Proven research skills, including identifying stakeholders and conducting interviews;
- High proficiency in English: ability to draft documents and make presentations in English;
- Ability to work within specified deadlines and to respect budgetary limits;
- Availability to participate to meetings of the Steering Committee.

To ensure a coherent policy approach, familiarity with ETUC demands, included in documents available on [this page](#).

#### 4. Time schedule and reporting

The subcontractor will be asked to sign the contract in April 2023. The preliminary findings of the report will have to be presented at one seminar which will be organised in September 2023 (possibly in Greece). The rest of the working calendar will be submitted to ETUC according to an agreed timeline, to be discussed on the occasion of the first meeting between the ETUC's project team and the subcontractor. Exchanges with the ETUC's project team will be planned on a regular basis to ensure a smooth coordination.

#### 5. Payment

The total maximum budget available for the fees of the subcontractor is as follows:

Contract with ETUC	
Main activities and Meetings	
<ul style="list-style-type: none"> <li>• Drafting the report in English</li> <li>• Participation in 3 seminars to present - and update, if necessary the content of the report. Participation in the project's final conference</li> <li>• Liaising with the ETUC project team, the Steering Committee and national affiliates when necessary</li> </ul>	
<b>Total budget for the Expertise</b>	<b>30 000 € (VAT and all taxes included<sup>1</sup>)</b>

The subcontractor will be remunerated in various instalments (advance and final payment). This amount covers all fees but does not include the travel and subsistence costs for possible physical meetings (which will be borne by ETUC according to its travel policy and on a case-by-case basis)

The studies will be duly and clearly accredited to the authors. Ownership of the results and of the written outputs (including the study produced by the sub-contractor) shall be vested in the ETUC, which shall have the right of first publication. The subcontractor may use the results and the written outputs after their publication by the ETUC, quoting the ETUC as contractor and the ETUC OSH project.

#### 6. Selection criteria

Bids will be evaluated and selected against the following criteria:

- Quality of the technical proposal submitted by the bidder;
- Verifiable expertise, experience and skills (including CV) as required and described in part 3 of this call;
- Proven track record of ensuring the quality of written materials produced, both in terms of content and format (i.e. previous publications) and in the relevant subjects specified in this call for tenders;

<sup>1</sup> Unless the subcontractor is exempt from VAT, VAT is always included in the total budget, also when reverse charge applies and VAT is borne by ETUC.

- Financial proposal within the prescribed budget.

### **7. 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.

All tenders must include at least two sections:

i) Technical proposal

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

- 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 of the 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.
- Specific information concerning the proposed methodology for delivering the tasks listed in part 2 of this call for tenders.

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 tenderers choose the exchange rate and assume all risks or opportunities relating to the rate fluctuation.

The maximum amount available for this contract is EUR 30,000 (VAT and all taxes included<sup>2</sup>).

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

### **8. Award Criteria**

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.

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<sup>2</sup> See footnote 2.

### **9. Content and selection of the bids**

**This call for tenders will be published on the ETUC website on 20 March 2023. Offers must be sent at the latest on 10 April 2023 at noon (12:00).** Offers must be sent to ETUC, in electronic format (by e-mail to [lmartin@etuc.org](mailto:lmartin@etuc.org)) and refer to the “ETUC OSH project – dual transitions”.

A committee will be formed comprising of 3 representatives of the ETUC. 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. 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;
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.