

Call for tenders ETUC Project 2023-03

## ETUC Call for tenders to subcontract the writing of a report analysing the limitations on achieving social objectives imposed by proposed economic governance rules

This is a call for a subcontractor to provide research capacity with a view to provide a report under the ETUC project EST (*ETUC Semester and Social Coverage Toolkit - Enhancing Trade Union Involvement and Mainstreaming social objectives in the European Semester*).

The ETUC will publish the call on its website, on 19 January 2024, and keep it online for 15 calendar days. **The deadline for submission of bids is 3 February January 2024.**

### 1. Background information on the project

Public investment is crucial to achieving social objectives. The economic governance rules currently being negotiated will have serious implications for the ability of governments to invest. As such, they constitute a major threat to the realising social objectives of the European institutions.

A core priority of the EST project is to enhance trade union involvement and mainstream social objectives in the European Semester. Binding rules hinder national governments from making even having the possibility of making necessary investments to achieve those objectives, would render this project priority impossible.

The ETUC has repeatedly highlighted the lack of research into the implications of the new fiscal rules in this regard. Governments have not undertaken thorough impact assessments, or at least have not made them publicly available. This research gap means that the decisions on returning the EU to fiscal rules that require austerity measures at national level are being taken without sufficient evidence as to their consequences.

With this call for tender, the ETUC is aiming to publish some research that can provide an overview of the scale of the implications the current proposals would have. The objective is to publish some succinct research prior to the final vote on economic governance rules in the European Parliament so that advocacy efforts and policy decisions can be undertaken in light of evidence.

### 2. Tasks to be performed by the subcontractor

The research should take as a basis commonly identified social objectives in line with the policy objectives of the ETUC. It should then show how the investments needed to achieve them are limited by the new economic governance rules set to be negotiated at trilogue. The research should include a breakdown by country of where investment capacity will be most hindered.

The research should be published in early March. The ETUC needs to have an opportunity to review its contents.

### 3. Expertise, experience and skills required

Sound expertise is required on the following issues:

- Knowledge of the latest developments and policy positions on economic governance rules of the three EU institutions with legislative power.
- Economic research and analysis capacity to provide strong evidence.

Sound experience is required in the following areas:

- Carrying out economic research on the implications of economic governance rules;
- Producing comprehensible material for a non-expert public;
- Successful track record of delivering in reports on similar policy-making areas at national and EU level.

Skills required:

- Proven research, drafting and presentation skills in English;
- Ability to work within specified deadlines and to respect budgetary limits;
- Ability to work in a multicultural context and understanding of different industrial relations systems, cultures & traditions;
- Good administration and project management skills.

### 4. Time schedule and reporting

The subcontractor will be asked to perform the above-mentioned tasks by 15 March 2024.

The progress and development of the study will be closely followed by the ETUC secretariat. Feedback by the secretariate on the draft report will be integrated by the subcontractor.

### 5. Payment

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

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|--|---|
| <b>Contract with ETUC</b>  |   |
| <b>Main activities and meetings</b>  |   |
| <ul style="list-style-type: none"> <li>• Produce a report of approximately 10 pages containing:               <ul style="list-style-type: none"> <li>○ An introduction/foreword</li> <li>○ An identification of investment needed to achieve social objectives</li> <li>○ A country breakdown of limitations imposed by currently proposed economic governance rules to making the investments.</li> <li>○ An overview of alternative solutions to reducing the social ambitions of the EU.</li> </ul> </li> </ul> |   |
| <b>Total budget for the Expertise</b>  | <b>€10 000 (VAT and all taxes included)</b> |

The subcontractor will be remunerated in various instalments (advance and final payment). This amount covers the fees but does not include the travel and subsistence costs incurred for attending project meetings (such as Steering Committee meetings and workshops, ETUC Committee meetings). These will be covered by ETUC on the basis of EU rules & thresholds (see the EC table of maximum amounts per EU member state).

## 6. Selection criteria

The selection criteria are in particular:

- Verifiable expertise, experience and skills, as required and described in part 3 of this call;
- Quality of the methodology proposed in the offer;
- Proven track record of ensuring the quality of written materials produced, both in terms of content and format (i.e. previous publications), in the relevant subjects specified in this call for tenders;
- Price/Quality ratio;

## 7. Form, structure and content of the tender

Tenders must be written in English. They must be signed by the tenderer or his/her 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 with an outline of the structure of the report and a mention of which social objectives figures will be used.

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:
  - CV of tenderer and of the other team members if applicable;
  - A selection of the most relevant works and/or articles published by the experts involved.
- Specific information concerning the proposed methodology for delivering the tasks listed in part 2 of this call.

- ii) Financial proposal

The prices of the financial proposal must be quoted in euros, including if the subcontractor 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.

Prices must be fixed amounts and shall not include travel expenses and daily allowances for the attendance to the Steering Committee meetings and other project events which will be covered by ETUC on the basis of EU rules & thresholds.

The maximum amount available for this contract is EUR 10 000 (VAT and all taxes included).

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.

## 9. Content and selection of the bids

**This call for tenders will be published on the ETUC website on 19 January 2024. Offers must be sent at the latest on 3 February 2024.** Offers must be sent to ETUC, in electronic format (by e-mail to [amartin@etuc.org](mailto:amartin@etuc.org)), and refer to our “Call for Tenders – EST”.