

Call for tenders for subcontracting expertise – INVOTUNES project on ‘National trade union involvement in the European Semester’: conducting the Finish case study

This is a call for a subcontractor to provide expertise as part of the implementation of the Commission-funded INVOTUNES project on ‘National trade union involvement in the European Semester’ – Finish case study.

In order to ensure a large visibility of this call for tender, the OSE published the tender specifications on its website on 29 January 2018, and will keep it online for 15 calendar days (deadline for submission of bids: 13 February 2018).

1. Summary of the project and description of the objective

High on the agenda of the present European Commission are two goals: relaunching social dialogue and boosting the involvement of social partners in the European Union’s (EU) socio-economic governance. In particular, the latter issue seems to have gained considerable momentum on the EU policy agenda. While a few studies have investigated the involvement of EU level social partner organisations in the procedures of the European Semester (ES) at the European level, little is known about the role and involvement of national social partners. Against this backdrop, the ‘National Trade Union Involvement in the European Semester’ (INVOTUNES) project aims at analysing the involvement of national trade unions in the procedures of the ES at both the European and national level, thus filling an important gap in the literature and helping to improve involvement through awareness-raising. The research will examine specific segments of the European Semester: employment and wage setting (policy areas that are particularly relevant for trade unions) and social protection and social inclusion policies under the Europe 2020 Strategy and will cover a five-year period between 2014 and 2018.

Into more details, the specific goals of the project are:

1. To identify the precise *mechanisms* through which national trade unions are involved in the European Semester at both national and EU levels;
2. To highlight individual *outputs and outcomes* of the involvement process;
3. To identify trade unions’ *strategies* for involvement, the determinants of such strategies and their effectiveness;
4. To provide advice to both trade unions and decision-makers at the European and domestic levels on how to increase the *effectiveness* of the involvement process – creating bridges within countries’ national social dialogue – and to share *good practices* and policy challenges in this area;

5. To increase *awareness* of the importance of the European Semester among domestic trade unions.

This will be done, inter alia, by performing 8 case studies concerning the following EU countries: Belgium, Bulgaria, Finland, Germany, Hungary, Italy, Portugal, and Sweden.

2. Purpose of the contract

The contractor is expected to perform the **Finnish case study**, following the analytical framework and the guidelines for the case studies elaborated by the research coordinators and discussed with the other partners, to begin with at the kick-off meeting in Brussels on 16th February 2018. In line with specific goals of the project, the report should identify the mechanisms through which Finnish trade unions are involved in the ES, the outcomes and outputs of the involvement project, the strategies followed by national trade unions in order to be involved. Furthermore, the report will include an in-depth analysis of the involvement of national trade unions in the elaboration and implementation of a specific policy measure (to be selected by the contractor in accordance with the research coordinators). Finally, the report should provide national trade unionists with concrete recommendations in order to be involved in the ES in an effective manner.

3. Tasks to be performed by the subcontractor

1. Conducting the Finnish case study through documentary analysis and interviews. The case study must follow the analytical framework and the guidelines for the case studies elaborated by the coordinators of the research. The length of the case study and the number of interviews to be conducted will be decided by the coordinator and the partners during the abovementioned kick-off meeting.
2. Participating to the conferences (kick-off, mid-term, final) and the three national workshops organized in the framework of the project.
3. Participating to the dissemination strategy of the findings of the project.

4. Expertise, experience and skills required

The successful candidate should have the following qualifications:

- PhD in social sciences or related disciplines or at least 10 years of research experience;
- Excellent knowledge of the EU's socio-economic governance and industrial relations.

5. Time schedule and reporting

Deliverables:

- D 2.1: Draft Finnish Country report (by month M7 – July 2018);
- D 2.2: Final Finnish Country report (by month 12 – December 2018);
- Draft of a Working paper drawing from the Country report to be published in the OSE WP Series (by month 17- May 2019).
- Participation to the national workshops (3), kick-off meeting, mid-term conference and final conference

6. Payment

The total maximum budget available for the fees of the subcontractor is € 21 600 (all taxes included).

The subcontractor will be remunerated in various instalments (advance (30 %) and final payment (70%)), after acceptance of the final case study by the Coordinator (OSE). This amount does not include the travel and subsistence costs incurred for attending conferences (3) meetings and the national workshops (3). These will be covered by the Coordinator (OSE) on the basis of EU rules and thresholds.

7. Selection criteria

The selection criteria are:

- Verifiable expertise, experience and skills, as required and described in part 4 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), in the relevant subjects specified in this call for tenders;
- Price not exceeding the amount stated above;
- Previous research/work undertaken in the field of industrial relations.
- Previous research/work undertaken in the field of EU labour market policies and legislation, with specific focus on self-employed workers

8. Form, structure and content of the tender

Tenders must be written in either English or French. 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:

1. 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/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.
- Specific information concerning the proposed methodology for delivering the tasks listed in part 3.

2. 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.

Prices must be fixed amounts and shall not include travel expenses and daily allowances for the attendance to the conferences and national workshops (which will be covered by OSE on the basis of EU rules & thresholds).

The maximum amount available for this contract is € 21, 600 (all taxes included).

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

9. 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.

10. Content and selection of the bids

This call for tenders has been published on the OSE website on 29 January 2018. Offers must be sent within 15 calendar days of the date of publication, by 13 February 2018. Offers must be sent to OSE, in electronic format (by e-mail to [Françoise Verri: verri@ose.be](mailto:Françoise.Verri@ose.be)).

A Committee will be formed comprising of two representatives of the OSE research team (project coordinator) and one member of the OSE General Assembly. 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 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 and inform the tenderers as well as the European Commission (project officer).