



Call for tenders ETUC Project 2021-06

ETUC Call for tenders to subcontract an expert to draft a study on Public Policies for Active Ageing

This is a call for a subcontractor to provide expertise with a view to support the activities of the Social Protection team under the ETUC project *SociAll – Enhancing social protection for all through the implementation of the EPSR*. More specifically, this call for tenders relates to the drafting of an expert study on active ageing.

The ETUC will publish the call on its website, on 19/02/2024, and keep it online for 15 calendar days. **The deadline for submission of bids is 04/03/2024.**

1. Background information on the project

The project supports the ETUC in enhancing the implementation of the EPSR, which represents a milestone for ambitious social rights and improved well-being of EU citizens and residents at all stages of life. In this context, the social protection of old-age rights and the concept of ageing in dignity deserve particular attention.

Through this project, we aim to develop a new approach to population ageing, in particular to all issues related to demographic trends: population ageing is not a negative aspect, but rather the positive result of the widespread well-being that social Europe has been able to ensure across decades. Workers' and people's rights must be implemented and their needs met when in old age, the most fragile phase of life. This is in line with the European Pillar of Social Rights, the solemn engagements of the Action Plan for its implementation, the Recommendation on access to social protection for workers and the self-employed, the conclusions of the high-level group Report on the Future of Social Protection and the Welfare State in the EU (which provided evidence-based recommendations for the EC and the Member States).

When examining the issues of adequacy of pensions and guarantee of old-age rights and at the same time the fiscal sustainability of adequate social protection, our approach does not focus only on the public expenditure. In a life-cycle approach, the SociAll approach is that fiscal sustainability is very much rooted in labour market inclusiveness, capacity to provide quality jobs, decent wages and fair contributions to the systems. Rather than trying to cope with the costs for pensions of an ageing population insisting on the retirement age or on the adequacy of pension income, one should look at the educational equipment people need to enter the world of work, the security of their careers, the inclusiveness of the labour market and its capacity to provide entitlements for them in view of their retirement.

The importance of the life-cycle approach is also stressed by the [High-Level Group Report on the Future of Social Protection and of the Welfare State in the EU](#) which has been [endorsed by the ETUC](#). Investing in people from the earliest stages of life and at all stages will enable workers, citizens and residents to live with dignity, to play a role in society and to have pension rights in the future.

Such an approach is also relevant in an economic approach and in the lights of concerns for the fiscal sustainability of workers. SociAll argues that increasing employment and its quality is beneficial not only for pensions adequacy but also for their sustainability.



Nowadays the issue of demography is highly debated, along with the one of labour shortages. Yet there are millions of people over 50 who are either inactive or unemployed; employers face 6% unemployment and only 3% of skills mismatch; Eurostat clearly shows high rates of involuntary part-time jobs, which means that jobs are there, companies hire people that have the required skills, yet the working conditions are not adequate.

2. Tasks to be performed by the subcontractor

As part of the ETUC project *SociAll*, the subcontractor will be entrusted with the drafting of an expert study.

The general aim of the study shall be to show how **public or widespread policy practices relating to active ageing** can be positive for companies, for society, but also for adequacy and sustainability of pension systems¹. They can be “good” or even “bad” practices to learn from. The [European Social Partners’ Autonomous Framework Agreement on Active Ageing](#) provides the following definition “Active ageing is about optimising opportunities for workers of all ages to work in good quality, productive and healthy conditions until legal retirement age, based on mutual commitment and motivation of employers and workers”.

The study will thus take into consideration relevant aspects of the Framework agreement, but the European and national social partners organisations will remain involved in monitoring its implementation.

The study can be articulated in three parts:

- **Context and overview:** it will contextualize the evidence-based relevance of public active ageing policies, providing relevant data to set the context on active ageing. This is currently of utmost importance because there is an [overall low employment rate of people over 50](#). This implies looking at data or experiences of employment practices or in the labour market that impact unemployment of these workers who are sometimes advanced in their careers and yet far from the legal retirement age. Interesting aspects to consider beyond the quantitative data could be: national trends/causes for high unemployment among 50+; attention devoted by MS in identifying/monitoring trends of population ageing (how far 50+ workers and their position in the Labour Market is detected and studied, on the basis of the quantitative assessment); particularly arduous jobs that do not fall among the categorised ones, for which usually member states foresee legislative measures allowing early retirement.
- **Focus on policy practices:** the study should focus on examples of **public policies supporting/enhancing (or not!) active ageing**, allowing people to work until their legal retirement age, be healthy and productive, and favouring the retention and promotion of

¹ Addressing broad population ageing challenges, the Commission also fosters Active Ageing, via its [guiding principles for active ageing](#), the [Active Ageing Index](#), a policy advocacy and monitoring tool, the [European Innovation Partnership for Active and Health Ageing](#), which fosters innovation, and provides funding. It also support the work of partner organisations, for instance the [social partner autonomous agreement](#), and the [covenant on demographic change](#).



older workers: e.g., incentivising schemes for companies to keep workers in place; broad training systems that may support the development of an approach of the different life stages; use of ESF+ for the specific purpose; systems enhancing collaboration of older and younger workers at once; retirement policies that do not penalise – might be important to refer to arduous work – people; provision of supporting services for older workers with partial disabilities or impediments, enabling them to remain active and in employment in spite of partial invalidity due to health issues (non-exhaustive list).

- **Impact of public active ageing policies:** the possible impact on pension systems of successful public policies supporting active ageing. In line with the aim of the SociAll project, the study will underline if and how active ageing is good for society, but especially for adequacy and sustainability of pension systems. Is there any scientific evidence that if MS keep/reallocate 50+ workers in quality employment, there is an impact on their contributory careers? On their accrual of entitlements? Their contribution to the public system via contributions and tax payments? The study should therefore look at the impact that identified public policy practices can have on effectiveness of social protection and systems, both in terms of adequacy and fiscal sustainability.

The subcontractor will also produce **some slides or other interim material**, to be discussed with the ETUC Steering Committee of the project, 1 month **ahead of the finalisation of the study**, so as to ensure that inputs from the grassroots are taken into consideration and trade union questions are addressed in the paper.

The subcontractor will provide the proof-read English version of the finalised study, while the ETUC be responsible for the layout and publication of the study.

3. Expertise, experience and skills required

Sound expertise is required on the following issues:

- Expert knowledge of social protection policy and old-age rights
- Experience in working on European level projects
- Good understanding of the European trade union movement.

Sound experience is required in the following areas:

- Carrying out in-depth research;
- Producing practical/pragmatic and comprehensible material for a non-research related public;
- Successful track record of delivering case studies for similar projects, with EU institutions and/or European stakeholders (social partners, NGOs, etc.).

Skills required:

- Proven research, drafting and presentation skills in English;
- Ability to work to 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 1/05/2024.



The progress and development of the study will be closely followed and monitored through collaboration with the project’s Steering Committee composed of the ETUC Social Protection team and the ETUC Social Protection and Pensions Committee. The Committee will give feedback on the draft study prior to the final publication during a webinar when the author will present the preliminary results of the study.

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"> • Produce a study of maximum 25 pages containing what outlined in part 2 of this call for tenders: <ul style="list-style-type: none"> ○ Context setting ○ Policy practices ○ Impact on social protection systems • Participate in meeting with the Steering Committee to discuss the evolution of the study 	
Total budget for the Expertise	€11,000 (VAT and all taxes included)

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;
- Previous research/work undertaken in the field of Social protection and old-age rights

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

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 tenderer and of the other team members if applicable;
 - 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.

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 11,000 (VAT and all taxes included).

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 19/02/2024. Offers must be sent at the latest on 04/03/2024. Offers must be sent to ETUC, in electronic format (by e-mail to amartin@etuc.org), and refer to our “Call for Tenders – SociAll Active Ageing”.

As Steering Committee, the ETUC Social Protection team will assess the bids received. One member of this committee will confirm the date and time of receipt 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.

The 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 Steering 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.