



Call for tenders ETUC Project 2021-06

ETUC Call for tenders to subcontract an expert to draft a study on the purchasing power of pensions in Europe

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*. This call for tenders relates to the partial re-drafting/ revision of an expert study on the purchasing power of pensions in Europe, in particular this would be an update of “Purchasing power of pensions in Europe” (attachment).

The ETUC will publish the call on its website, on 28/03/2024, and keep it online for 10 calendar days. **The deadline for submission of bids is 08/04/2024.**

1. Background information on the project

The SociAll project aims at reversing the approach to the public expenditure for pensions, healthcare and long-term care from mere “costs of ageing” towards the valorisation of the “*dignity of ageing*” deserved by workers and EU residents in their elderly years. This approach is rooted in the fact that 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 the 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).

As part of the austerity strategies to save on costs of demographic ageing, many Member States make it more difficult to adapt pensions to the increasing cost of life. Indexation and revaluation of pensions lack behind with respect to the cost of most basic needs, as remarked by the ETUC more and more often recently.

The cost of living crisis currently affecting EU population, is exacerbating inequalities already existing in our societies, with [low paid workers and vulnerable groups hit the hardest](#). In this scenario, the collapse in the real value of pensions is worsening the conditions of the elderly in the EU, [putting millions of pensioners at risk of poverty](#). Besides, people over 65 years old were already among the people most likely to have [problems paying their energy bills in 2019](#) and the increase in energy prices was already hitting older people as they spend more time at home.

Member states are falling short in guaranteeing the right to “age in dignity”, which is at the centre of the ETUC action on welfare.

The risk of poverty in Europe underwent a sharp increase since 2008 (year of publication of the study to update) because of the crisis, followed by an overall decrease for some years, and raised again since the Covid-19 pandemic, and such context the elderly are disproportionately affected (see the ETUI-ETUC-SociAll study: [Minimum income across all ages: focus on elderly people](#)).



While a more inclusive labour market and more quality jobs are fundamental not only to secure income during the working life, but also to ensure pension adequacy, it is also necessary to act on pension policy in order to guarantee appropriate replacement rates and **a process of full indexation and revaluation of pensions which is aligned with the increase in the cost of living**. This is also brought about as a crucial issue by the ETUC Resolution “For fair and inclusive pension policy in the EU” approved by the Executive Committee on 27 March 2024.

The update of the study on the purchasing power of pensions in Europe is therefore of utmost importance to assess the current situation of older people and understand what are the actions that need to be undertaken to ensure that people in the EU age in dignity.

2. Tasks to be performed by the subcontractor

The subcontractor will **update** the study “Purchasing power of pensions in Europe”, examining how the purchasing power of pensions has changed over time – also considering gender inequalities –, considering the new challenges that our society has to face, the new social goals of the EU and of member states.

The revised study shall **take into account the structure of the existing study**: Introduction

- Pensioner incomes: provide an overview of pensioners’ income across the EU considering both earnings-related pensions, the replacement rates and minimum pension systems
- Pensions in the maintenance of living standards: assessing the adequacy of pensions in EU Member States when it comes to ensuring a life in dignity
- Pension indexation, focusing on the following aspects: choices of indexation criteria; the indexation/valorisation of past earnings up to the first pension payment; indexation of minimum pensions; mechanisms and criteria of indexation of pensions in payment; involvement of social partners and trade unions in the indexation procedures; figures of indexation; effective protection of pension purchasing power: wage-linking and social implications.
- Conclusions/recommendations for policy makers

This will be crucial to provide an update overview of facts and figures dating back to years ago.

However this will represent a basis for addressing more/different aspects, develop alternative angles and provide new data and perspectives to the dimension of non-full indexation/revaluation of pensions and their consequences.

The subcontractor can present her/his ideas on how to update/modify/build on the existing material in the submission of his bid.

The subcontractor will ensure the proof-read version of the **finalised study of 30 pages**, in English, French or Italian, while the ETUC will take care of the translation into other languages, layout and publication of the study.

The subcontractor will also produce **an interim draft**, to discuss with the ETUC SociAll Team, twenty days **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.

3. Expertise, experience and skills required

Sound expertise is required on the following issues:

- Expert knowledge of social protection policy and pension policy
- 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 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 20/05/2024 – with the material for the exchange on the interim paper by 30/04/2024.

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 latter will give feedback on the draft study prior to the final publication.

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 30 pages, touching on the points listed in paragraph 2 of this call, and containing among other elements:<ul style="list-style-type: none">○ Pension issues in the maintenance of living standards○ Pension indexation○ Conclusions• Participate in meetings with the Steering Committee to discuss the evolution of the study	
Total budget for the Expertise	€ 3000 (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 fiscal policy

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 3000 (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 DD/MM/YYYY. Offers must be sent at the latest on DD/MM/YYYY. Offers must be sent to ETUC, in electronic format (by e-mail to amartin@etuc.org), and refer to our “Call for Tenders – SociAll – Purchasing Power of Pensions in Europe, study update”.

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.