

Call for tenders ETUCProject2023-03 EST

# ETUC Call for tenders to subcontract the expertise in the ETUC project 'ETUC Semester and Social Convergence Toolkit - Enhancing Trade Union Involvement and Mainstreaming Social Objectives in the European Semester (EST)'

## Update and development of the "ETUC Sustainable Growth and Decent work Index" (#EU\_SDG8i).

This is a call for a subcontractor to provide expertise for the update and development of the "ETUC Sustainable Growth and Decent work Index" (#EU\_SDG8i) in the ETUC project 'ETUC Semester and Social Convergence Toolkit - Enhancing Trade Union Involvement and Mainstreaming Social Objectives in the European Semester (EST)'.

The ETUC will publish the call on its website, on 30<sup>th</sup> of January 2025, and keep it online for 20 calendar days. **The deadline for submission of bids is 19<sup>th</sup> of February 2025.**

### 1. Background information on the project

The project '*ETUC Semester and Social Convergence Toolkit - Enhancing Trade Union Involvement and Mainstreaming Social Objectives in the European Semester (EST)*' will continue empowering ETUC in the economic governance of the EU and will further scale up instruments to extend the capacity of European trade unions to be actively involved in the European Semester. TUSLOs (Trade Union Semester Liaison Officers) coordinate the trade union action in the economic and social governance of the EU with specific reference to the European Semester. They will continue to lead on matters concerning sustainable economy and quality jobs, implementation of the Social Convergence Framework and the common objectives in the renewed Stability and Growth Pact, including the Sustainable Development Goals.

ETUC team and TUSLOs, with upgraded or additional tools, are called upon to implement a 3-block strategy which fights austerity, promotes sustainable investment and enhances trade union involvement in the EU Semester. The 3 blocks are part of a single strategy, and their activities and outcomes are strongly interrelated, with the ETUC overarching aims for quality jobs, social resilience, economic sustainability, and strategic thinking.

**The work that is addressed by this call for tender is aimed at updating and renewing the ETUC index of decent work and sustainable economy which serves the ETUC 3-block strategy, as covered by the project's work package 4 on Sustainability.**

Based on one composite index and 3 sub-composite indexes, backed by 24 indicators, the #EU\_SDG index is a tool that helps reading the impact of policies and it is an instrument that supports policy making by highlighting correlations between several variables to improve the policy designing in the social sustainability field. It can also be publicly consulted in dynamic webpages on <http://est.etuc.org>.

The #EU\_SDG8i will be supporting the ETUC political priorities and demands in the EU Semester. In the reformed Stability and Growth Pact, the European Semester continues to be the main framework for coordination of fiscal, economic and social policies, but new features have been included to simplify the process (simplified fiscal rules), to privilege medium term approach to reform and investments (Mid-Term Fiscal Structural Plans) and to enhance the social dimension (Social Convergence Framework). The ETUC is now adapting its action to the renewed EU Semester, including its #EU\_SDG8 index.

This tender is aimed at receiving expertise to update and process new data to identify trends in decent work and quality jobs, in particular upward convergence trends and their interrelation with other key performance indicators related to European Common Objectives. . The #EU\_SDG8i will analyse data and indicators for all the EU Countries. This work-package moves from the assumption that the new economic governance framework has to ensure upward social convergence in economic and geopolitical scenarios in continuous and fast transformation. In this contest is important that the SDG8 index provides a solid narrative to support a quality job narrative as complement of the EU key strategies such as competitiveness compass, digital agenda, clean industry and social investments. Just transition and social justice remain 2 urgent challenges, measured mainly with employment level, job stability, job transitions, inequalities, poverty and education, and training performances, therefore confirming the relevance of the Porto's targets related to the European Pillar of Social Rights, but also going beyond them to tackle all main social risks of the current economic and geopolitical contingency.

The ETUC dashboard for Sustainable Growth and Decent Work will serve as reference for countries when assessing progress in their efforts of upward social convergence in the short to medium-term, in light of the long-term trends in more detailed aspects of economic well-being, inclusive labour markets, removal of workers' vulnerabilities, environmental sustainability and digital progress.

The work package will advance proposals for the deployment of analysis and modelling that showcase the centrality of decent work in the overall sustainability agenda. Furthermore, the work package will also look at the inter-dependance between indicators measuring the fairness of the taxation systems and advantages of social investments.

In order to create ownership and usability of the #EU\_SDG8 index it is necessary to create consensus ownership in the ETUC constituency. For that reason, the ETUC has set up an ad-hoc group that will instruct and validate work of experts, under the supervision and coordination of the ETUC. The group is composed by TUSLO and by trade union experts with specific competences in statistical and econometric analysis. During the first meeting, the ad-hoc group will provide inputs on the development of the SDG8 index. During the second meeting, the ad-hoc group will provide an assessment of the proposal made by the subcontractor, and the group will validate the final report of the subcontractor.

## 2. Tasks to be performed by the subcontractor

**The subcontractor will be tasked to, preserving the methodology, structure and scope of the #EU\_SDG8 index:**

- Preform a fitness check of the #EU\_SDG8 with ETUC strategic objectives of upward social convergence in the light of reformed Stability and Growth Pact and the common objectives identified therein.
- Update the index with the most recent data for 2023 and 2024, and attribution of missing data via alternative sources.
- Establish correlations between #EU\_SDG8i and indicators of quality of social justice, environmental, technological development and just transition.
- Draft a Policy brief analysing #EU\_SDG8index and its correlations for 2024 (10 pages, English)
- Draft a Policy brief analysing #EU\_SDG8index and its correlations for 2025 (10 pages, English)
- Draft #EU\_SDG8index correlation analysis summarizing the updated data
- To prepare and lead 2 online meetings (in February and April 2025)

The subcontractor will be required to share their proposals with the #EU\_SDG8 index ad-hoc group in

order to receive advice and validation of the work done within the times and deadlines agreed with the ETUC.

### 3. Expertise, experience and skills required

**Sound expertise is required on the following issues:**

- Expert knowledge of the EU policy framework in the social and economic field (Senior expert: + 10 years, Juniors: + 3);
- Expert knowledge of the Stability and Growth Pact as reformed in 2024 and its relevance for the EU policy in the social and economic field
- Expert knowledge of the upward social convergence in the EU and of the indicators addressing the taxation systems in the EU.
- Sound understanding of the trade union movement and ETUC.

**Skills required:**

- Proven research and presentation skills (Senior expert: + 10 years, Juniors: + 3);
- Report drafting skills (in English);
- Ability to translate statistical data in the policy narrative
- Ability to find and explain correlations between different sets of data
- Ability to identify and integrate analyses of current labour market issues faced by employers' and trade unions' organisations in the EU countries;
- Ability to work within specified deadlines and to respect budgetary limits;
- Ability to work in a multicultural context and understanding of different industrial relations culture & traditions;

### 4. Time schedule and reporting

The subcontractor will be asked to work for 6 months from the assignment of the tasks (signing of the service contract) – ideally from **1 March 2025 to 1 September 2025**. The subcontractor will be responsible for submitting the deliverables within the following timeframe:

By the end of Month 2 (April 2025): Fitness check of the #EU\_SDG8 index

By the end of Month 4 (June 2025): Update the index with the most recent data for 2023 and 2024

By the end of Month 6 (August 2025): Draft Final report (2 Policy briefs and correlation analysis)

## 5. Payment

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

<b>Contract with ETUC</b>	
<b>Main activities</b>	
<ul style="list-style-type: none"> <li>• Fitness check of the #EU_SDG8 with ETUC strategic objectives of upward social convergence in the light of reformed SGP and the common objectives identified therein.</li> <li>• Update the index with the most recent data for 2023 and 2024, and attribution of missing data via alternative sources.</li> <li>• Establish correlations between #EU_SDG8i and indicators of quality of social justice, environmental, technological development and just transition.</li> <li>• Draft a Policy brief analysing #EU_SDG8index and its correlations for 2024 (10 pages, English)</li> <li>• Draft a Policy brief analysing #EU_SDG8index and its correlations for 2025 (10 pages, English)</li> <li>• Draft #EU_SDG8index correlation analysis summarizing the updated data</li> <li>• To prepare and lead 2 online meetings (in February and April 2025)</li> </ul>	
<b>Total budget for the Expertise</b>	<b>15.000 € - (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 eventual project meetings.

## 6. Selection criteria

Bids will be evaluated against the following criteria:

- Verifiable expertise, experience and skills, as required and described in part 3 of this call;
- Proven track record of ensuring the quality of materials produced, both in terms of content and format, 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:

- 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;
  - A selection of the main works and/or articles published, in relation to the relevant subjects specified in this tender.
  - Specific information covering each of the award criteria listed in point 3 and 6, and the work plan and tasks identified in point 2.

## 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 project events which will be covered by ETUC on the basis of EU rules & thresholds.

The maximum amount available for this contract is 15.000 EUR - (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 the 30<sup>th</sup> January 2025. Offers must be sent at the latest on the 19<sup>th</sup> of February 2025.** Offers must be sent to ETUC, in electronic format (by e-mail to Marco Cilento, [mcilento@etuc.org](mailto:mcilento@etuc.org)), and refer to “Call for Tenders – ETUC SDG8index”.