

## Call for tenders for subcontracting expertise in the field of Social Dialogue indicators

This is a call for a subcontractor to provide expertise in the framework of the implementation of the ETUC Polaris project.

The ETUC will publish the call on its website on 26 May. The **deadline for submission of bids is 29 June 2025 at midnight (24:00).**

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## **1. Context of the expert study: the ETUC Polaris project**

### **1.1 Summary and objectives of the project**

The Polaris project aims at evaluating and following the state of social dialogue at EU and national level. The evaluation will provide the ETUC and its members with key data and information to better chart the course of action for the next years, with the end goal of strengthening social dialogue in the EU.

The Council Recommendation on Strengthening Social Dialogue invites the Employment Committee and the Social protection Committee to “- explore, in consultation with relevant social partners, and deliver an opinion to the Council on the possibility to improve the scope and relevance of data collection at Union and national level on social dialogue, including on collective bargaining, appropriate for monitoring the implementation of this Recommendation”.

With the Polaris project, the ETUC is now planning to accompany the implementation of the Recommendation and carry out its own data collection exercise. This exercise will allow ETUC and its members to contribute to a meaningful implementation of the Recommendation so that it truly supports social dialogue at national and European level. The state of social dialogue will be described thanks to a set of indicators that will be identified during the course of the project. After having selected the indicators, the picture emerging from the data will be used as basis for charting upcoming ETUC action. Particular focus will be placed on the sustainability aspect of the exercise: a method will be established for the collection and analysis of the indicators so as to facilitate the repetition of the exercise. This will provide the possibility to monitor and analyse developments in Social Dialogue in the coming years, ideally highlighting successes and identifying gaps in the implementation of social dialogue outcomes. Through all stages of the project implementation - data collection, mapping and analysis –, the exercise will allow trade unions across Europe to develop a shared understanding of the challenges to social dialogue and possible actions to make sure it can contribute to positive outcomes for workers in Europe.

The specific objectives of the project are to:

1. Develop a common understanding of the information needed to evaluate the state of Social Dialogue in the EU;
2. Select the indicators that can be used to evaluate the state of Social Dialogue;
3. Carry out an evaluation of the state of Social Dialogue;
4. Develop a methodology that can be used to repeat the evaluation;
5. Based on the evaluation, draft priorities for ETUC and member organisations to be integrated in the upcoming activities.
6. Support ongoing negotiations on and implementation of the Pact on Social dialogue and the new European Social Dialogue Work Programme.

For each of these specific objectives, we foresee the following:

- i. **Developing a common understanding of the information needed to evaluate the state of Social Dialogue in the EU:** This will include an introduction to indicators and developing a common understanding of the information needed to evaluate the state of Social Dialogue in the EU. ETUC plans to dedicate sufficient time to these discussions, as the strength of the project's outcomes depends of the solidity of these preliminary discussions. Establishing this framework will be useful for the purposes of the project and at the same time they will deepen our understanding of the expectations of trade unions across Europe. On this, the project will help find common ground, thus improving the coordination and effectiveness of the ETUC Social Dialogue Committee.
- ii. **Select the indicators that can be used to the evaluate the state of Social Dialogue:** This will be done based on the discussions held under the umbrella of Specific objective 1. ETUC is aware of the fact that indicators on social dialogue are already available. Once agreed on information needed to evaluate the state of social dialogue, the project will investigate existing resources (including for example available data from Eurofound, ILO, OECD, ETUI) to see which are the most relevant in light of the project's objectives.
- iii. **Carry out an evaluation of the state of Social Dialogue:** Based on the data from the selected indicators and on feedback from ETUC, describe the state of social dialogue in the EU and member states and chart the way forward. This will contribute to building and reinforcing the capacity of national social partners to engage in national social dialogue and will foster the implementation of different social dialogue outcomes, including the Recommendation on strengthening Social Dialogue in the EU.
- iv. **Develop a methodology that can be used to repeat the evaluation:** The Polaris project will allow to take a snapshot of the state of play of social dialogue, but it will also be interesting to repeat the exercise in the next years to assess the evolution of this state of play. ETUC believes that, over time, the monitoring will show the impact of the implementation of different social dialogue outcomes, such as the Recommendation on Strengthening Social Dialogue in the EU and of the Pact on European Social dialogue, highlighting successes and pointing at needs for further action. In order to facilitate this, ETUC will insist to develop a methodology that allows for an autonomous repetition of the exercise and a long-term monitoring of the state of social dialogue. This methodology should include a proposal on how to graphically illustrate the state of social dialogue (for future use on a website).
- v. **Based on the evaluation, and in cooperation with the ETUC team, draft recommendations for ETUC and member organisations to be integrated in the upcoming activities.** This will contribute to building and reinforcing the capacity of national social partners to engage in national social dialogue and will foster the implementation of different social dialogue outcomes, including the Recommendation on strengthening Social Dialogue in the EU.

This process will, indirectly, also support the ETUC in ongoing negotiations on the new European Social Dialogue Work Programme and the implementation of the Pact on European Social dialogue. Ensuring the coordination of the trade union movement will be key to support the negotiations and implementation strategies.

## 1.2 Context of the project

Through its action in recent years, the European Commission has brought a much needed focus on Social Dialogue. The European Pillar of Social Rights and the Action Plan from 2021 highlighted the need to reinforce and strengthen social dialogue. This was subsequently followed-up under the leadership of President Von der Leyen and Commissioner Schmit, notably through the Commission Communication on Strengthening Social dialogue, the Recommendation on Strengthening Social Dialogue and the Val Duchesse declaration that launched a new process for a Pact on Social Dialogue.

The Council Recommendation of 12 June 2023 on Strengthening social dialogue in the European Union is the first piece of *acquis Communautaire* concerning Social Dialogue. ETUC is convinced that it can provide a strong basis to reinforce social dialogue at national level, as outlined in the “Position on the Social Dialogue Initiative” adopted at the Executive Committee Meeting of 30-31 March 2023: *“The proposal for a council recommendation has the potential to be a positive tool to strengthen social dialogue and collective bargaining at national level. In particular, the focus on an enabling environment for bipartite and tripartite social dialogue, effective social partner involvement in policy making, removing barriers to collective bargaining and capacity building measures could provide a basis for trade unions to push for social dialogue and collective bargaining.”*

In addition to the Recommendation, the Val Duchesse declaration represents a renewed commitment to reinforcing social dialogue. As part of the Declaration, the Commission, Council, and Social Partners resolve to take action to strengthen the capacities of social partners and improve the functioning of social dialogue. The Pact for European Social Dialogue also represents an important commitment by the Commission and European Social Partners to strengthen social dialogue at European level.

Despite this much welcome focus, social dialogue at European level has recently also experienced some disappointing setbacks. The failure of the social partners’ negotiations on Telework and the Right to Disconnect that ended in November 2023 shows that work needs to be done to strengthen social dialogue to deliver strong mandates and adopt and implement outcomes. This is true for Social Dialogue also at national level, where in many cases trade unions face difficulties with the implementation of agreements. Besides difficulties met in ensuring employers’ engagement in the implementation of agreements, another common challenge on the national level is the lack of resources and sometimes long delays in delivering the funding, while accessing the funds also requires technical expertise.

These challenges take place in a political context that is generally shifting towards the right of the political spectrum, which intensifies existing issues and creates new ones. In Finland, for example, the new right-wing government set up to weaken social dialogue immediately after entering into office, threatening to legislate on labour market issues without respecting the tradition of social dialogue and showing disregard for the traditional trade-off between flexibility and workers’ protection. In Sweden, Tesla refuses to negotiate with trade unions, instead unilaterally imposing terms and conditions seeking to undermine the industrial relations model.

The next years will be key to answer these challenges and bring new energy to social dialogue. Important contributions will be made through the outcomes of Val Duchesse and the Pact on European Social Dialogue, the negotiations of a new Work Programme of the EU Social Partners and a meaningful implementation of the Recommendation on Strengthening Social

Dialogue in the EU. The ETUC and its affiliates are committed to delivering good results on all of these points, that represent some of the main priorities in the field of social dialogue and are all featured in the Action Plan presented at the Berlin Congress in 2024.

## 2. Tasks to be performed by the subcontractor

This call for tenders concerns expertise in the field of social dialogue indicators.

The expert will be asked to coordinate with the ETUC Social Dialogue team and to support the ETUC to achieve the project's objectives through the following tasks:

- Supporting the ETUC in drafting the agenda, preparing background material, and attending the three workshops in person. The expert will also be expected to present the key topics and lead part of the discussions during the workshops. The focus for the **three workshops** will be:
  - Workshop 1: Asking the questions: what are the building blocks of social dialogue? Developing a common understanding of the information needed to evaluate the state of Social Dialogue in the EU; introduction to indicators;
  - Workshop 2: Identifying indicators: Searching existing resources and choosing the data that can better serve the project's objectives;
  - Workshop 3: Analysing the situation and charting the way: thanks to the selected indicators, paint the picture of the state of social dialogue in the EU and member states and chart the way forward.

The workshops will be conducted with an interactive approach, where all participants will be invited to contribute. This kind of involvement is needed to ensure that the project's activities contribute to building a shared understanding of the building blocks of social dialogue.

- Establish a **methodology** to repeat the analysis mentioned in the point above.
- Draft **three reports** on :
  - The selected indicators and reasons behind the selection (+/- 15 pages, online dissemination);
  - Methodology for analysis of state of social dialogue (+/- 15 pages, online dissemination);
  - State of play of social dialogue and pointers for action (+/- 30 pages, online dissemination and printed version);

The reports must be drafted in English and proofread. The use of visual facilitation, graphics and tables to better illustrate the content of the reports are strongly encouraged. They will represent tangible outputs of the exchanges and of the knowledge created during the project. Selecting indicators will require identifying and assessing existing indicators as well as questioning and agreeing on the aspects of social dialogue that need to be looked at, and what they are really composed of. When carrying out this tasks, the expert(s) will liaise with the ETUC social dialogue team as well as any relevant stakeholders including (but not limited to) the ILO, Eurofound, OECD and the European Commission. The reports will develop a systematic approach to the exchanges that took place during the workshops in order to allow the repetition of the exercise.

- Supporting the ETUC in drafting the agenda, preparing background material, participating in person, and presenting key project results on the occasion of the **final conference** of the project.

The final conference will be the moment where all the activities are brought together. It will be open to a larger audience than the ETUC members, including representatives from the European Commission, the Council including the presidency and a representative from EMCO, Eurofound, representatives from employers' organisations, as well as academia through the ETUC and ETUI's network of experts and other relevant or interested stakeholders.

### **3. Expertise, experience and skills required**

The drafting of the report requires sound and proven expertise in the following fields:

- A wide expertise on EU and national level social dialogue;
- Knowledge of indicators and expertise in working particularly with social dialogue indicators;
- Experience in working on European level projects;
- Experience in working with trade unions at both European and national level.

Skills required:

- Proven ability to carry out in-depth research on EU issues and understanding links between European and national level;
- Proven research skills, including identifying stakeholders and conducting interviews;
- Capacity to adapt and interact with union members, making the most of the opportunities for exchange provided by the project;
- Capacity to lead and moderate workshops;
- High proficiency in English: ability to draft documents and make presentations in English;
- Ability to work within specified deadlines and to respect budgetary limits;
- Availability to participate to project meetings.

To ensure a coherent policy approach, familiarity with ETUC demands included in documents available [on this page](#) is important.

### **4. Time schedule and reporting**

The subcontractor will be asked to sign the contract in July 2025. They will have to be available for a first workshop taking place indicatively towards the end of October 2025. The draft documents will be submitted to ETUC according to an agreed timeline.

### **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"> <li>• Establishing methodology</li> <li>• Drafting the three reports</li> <li>• Actively participating in the workshops and final conference</li> <li>• Liaising with the ETUC project team, the Steering Committee and national affiliates when necessary</li> </ul>	
<b>Total budget for the Expertise</b>	<b>60 000 € (VAT and all taxes included)</b>

The subcontractor will be remunerated in various instalments (advance and final payment). This amount covers all fees but does not include the travel and subsistence costs for possible physical meetings.

The report will be duly and clearly accredited to the authors. Ownership of the results and of the written outputs (including the study produced by the sub-contractor) shall be vested in the ETUC, which shall have the right of first publication. The subcontractor may use the results and the written outputs after their publication by the ETUC, quoting the ETUC as contractor and the Polaris project.

## 6. Selection criteria

Bids will be evaluated against the following criteria:

- Quality of the technical proposal submitted by the bidder;
- Verifiable expertise, experience and skills (including CV) as required and described in part 3 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) and in the relevant subjects specified in this call for tenders;
- Financial proposal within the prescribed budget.

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

Tenders must be written in English. 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:

- 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 of the 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 2.

ii) 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.

The maximum amount available for this contract is EUR 60,000 (VAT and all taxes included<sup>1</sup>).

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 26 May 2025. Offers must be sent at the latest on 29 June 2025 at midnight (24:00).** Offers must be sent to ETUC, in electronic format (by e-mail to [lmartin@etuc.org](mailto:lmartin@etuc.org)) and refer to the “ETUC Polaris project”.

A committee will be formed comprising of 3 representatives of the ETUC. 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;
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;

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<sup>1</sup> Unless the subcontractor is exempt from VAT, VAT is always included in the total, also in case it's ETUC who has to pay it in case of reverse charge.



4. The names of candidates put forward and justification of their choice in terms of the selection or award criteria.