

Call for tenders ETUC Project 2023-09

ETUC Call for tenders to subcontract an expert to conduct a survey on trade union organising, bargaining and mobilising capacity

This is a call for a subcontractor to provide desk research with a view to support the activities of the UnionPower project. More specifically, this call for tender will provide a valuable overview of practices and emerging sectors of trade union renewal and development.

The ETUC will publish the call on its website, on 27 May 2024, and keep it online for 24 calendar days. **The deadline for submission of bids is 20 June 2024.**

1. Background information on the project

Union membership and the share of workers covered by collective agreements at national level is declining (from an EU average of about 66% in 2000 to about 56% in 2019). Newer forms of employment such as platform work and certain groups such as young people are also less likely to be represented, with some sectors like care seeing a near-total absence of collective bargaining. The COVID19 pandemic exacerbated inequalities in society and without effective social dialogue then inequalities may increase even further. These inequalities are felt more readily by women, LGBTQI, and migrants.

Post COVID19 pandemic, more workers are teleworking, adding to the increase in recent years of non-standard, part-time and temporary work, and speeding up the decline in large workplaces bringing together large numbers of workers – all of which calls for more digital communications, engagement and organizing.

Against this background, the ETUC intends to subcontract an external expert to explore the structures, capacities and practices of ETUC member organisations when it comes to organising, mobilising and collective bargaining. The expert will be commissioned to conduct a survey among ETUC member organisations and produce a study report on emerging and evolving sectors with potential for trade union growth. The results will be used to augment capacity-building trainings and on-the-ground support for local unions, with the aim to strengthen the mobilising and organising capacity of the European Trade Union movement and facilitate a more coordinated approach throughout European trade unions to build membership and outreach.

2. Tasks to be performed by the subcontractor

As part of the ETUC project UnionPower the subcontractor will be entrusted with desk research and a survey(s) among ETUC affiliates. The subcontractor will need to perform two main sets of tasks(divided in two Lots):

Lot 1: Preparing and conducting a survey (online questionnaire) among ETUC members on organising and collective bargaining

- Who organises and retains workers by country and by union (confederations, sectoral federations, national/regional federations, local units, etc.)?
- What are their organising methods (shop stewards, call centres, organising departments, digital outreach etc.)?
- What are the national practices when it comes to collective actions and strikes (financial and human resources, networks, etc.)?
- What are the internal structures of ETUC member organisations, (e.g. decision-making bodies, women or youth or other committees and how do they interact with sectoral federations, do they have diversity structures / mechanisms to include quotas)?
- What are the capacities for education of organisers, shop stewards, young leaders, women leaders, migrant workers, and other diversity structures?
- What are the capacities and best practices of ETUC member organisations in communications and digital trade unionism?
- What are the best practices, needs and interests of all ETUC member organisations for recruiting and retaining membership?
- What is the trade union density in different sectors and among different categories of workers (age, gender, etc.) and what are the emerging sectors for potential trade union growth?

In consultation with the project Steering Committee, the subcontractor will develop the survey questions and a template to be followed for the presentation and examination of each question included in the study, so as to ensure a coherent and practical approach.

The outcomes of Lot 1 will be broken-down into a survey (online questionnaire, in English) and a preliminary report which is due by 25 November 2024. This preliminary report is a structured compilation of the ETUC members' survey results.

Lot 2: In depth study on trade union trade union organising, bargaining and mobilising capacity

- In depth analysis of the survey results of Lot 1 and potential follow-up with ETUC members
- Conducting desk research to explore employment and labour market trends as well as emerging sectors with a potential for trade union membership growth especially with regards to age/ gender and non-standard forms of work (e.g. what are the next potential targets and possible obstacles)?
- Compiling information on trade union density (by country and/or sector), through desk research, in addition to the survey results of Lot 1
- Compiling information through desk research on collective bargaining regimes in each European country (do they bargain at sectoral level, do they bargain at set moments, is there a right to collective bargaining, etc.)
- Drafting a final report which compiles research results of Lot 1 and Lot 2 in a readable and accessible way as well as recommendations for trade union growth and mobilisation

The final outcome of Lot 2 is a study report and recommendations which shall serve as a tool for trade union leaders and activists when considering the best way to renew their organisations, and recruit and retain members to strengthen their outreach and collective bargaining. The purpose of this study is to give practical guidance and as such must be structured in a user-friendly way.

The subcontractor will ensure the proof-reading and editing of the finalised study, while the ETUC will account for the layout, publication, and dissemination of the findings.

3. Expertise, experience and skills required

Sound expertise is required on the following issues:

- Expert knowledge in the field of research;
- Expert knowledge of trade union rights and systems;
- Practical experience or demonstrated interest in trade unions;
- Experience in working on European level projects;
- Prior experience in developing similar questionnaires/research questions;
- Skills required:
 - Ability to understand the ETUC's project team needs and to give advice on recommended solutions;
 - Ability to interact in English fluently;
 - Ability to work within specified deadlines and to respect budgetary limits;
 - 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 in 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;
- Proven skills in drafting case study reports and interview templates;
- 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 25 November 2024 (Lot 1) and June 2025 (Lot 2).

Timeline Lot 1:

- End of June 2024: signing of the service contract
- 10 July 2024: draft proposal of survey questionnaire
- 12 July 2024 (tbc.): meeting with ETUC taskforce on trade union renewal to present draft survey
- End of July 2024: finalised survey to be circulated to ETUC membership
- 19 September 2024 (tbc.): meeting with ETUC taskforce on trade union renewal
- 25 November 2024: submit preliminary report to ETUC

Timeline Lot 2:

- The progress and development of the in-depth study will be closely followed and monitored through collaboration with the ETUC trade union renewal team.
- June 2025: submit final study report to ETUC

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 questionnaire, a preliminary report and a final study report • Participate in a number of project coordination meetings with the Steering Committee to discuss the evolution of the study. 	
Total budget for the Expertise	Lot 1: up to 15.000 € Lot 2: up to 18.000 € (VAT and all taxes included)

Each Lot will be the object of a service contract (so 2 service contracts will be signed with the subcontractor). 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 meetings of the ETUC taskforce on trade union renewal). 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 (25%);
- Quality of the methodology proposed in the offer (35%);
- 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 (25%);
- Price/Quality ratio (15%).

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) Two financial proposals (one for each Lot)

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 these contracts is up to 15.000 EUR (VAT and all taxes included) for Lot 1 and up to 18.000 EUR (VAT and all taxes included) for Lot 2. The offer should include a breakdown of the NET amount and the corresponding VAT amount.

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 27 May 2024. Offers must be sent at the latest on 20 June 2024. Offers must be sent to ETUC, in electronic format (by e-mail to amartin@etuc.org), and refer to our “Call for Tenders – UnionPower”.

As Steering Committee, the ETUC project 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.