

Call for tenders ETUC Project 2024-04

Call for tenders for subcontracting an expert for the ETUC project on “New horizons for Democracy at Work”

This is a call for a subcontractor to provide expertise as part of the implementation of the ETUC project on “New horizons for Democracy at Work”.

This call for tenders will be published on the ETUC website on Wednesday 23 June 2025 and will be kept online for 39 calendar days. Offers must be sent at the latest on Saturday 1 August 2025 to ETUC.

1. Background information on the project

Workers’ rights to information, consultation (IC), and participation have been part of the European policy agenda since the 1974 Social Action Programme. The **1989 Community Charter of the Fundamental Social Rights of Workers** promoted employee participation and in 2009 the **Charter of Fundamental Rights** gained binding force with its **Article 27** recognising the right to information and consultation. Under **Article 153 TFEU**, the EU can adopt measures to promote cooperation and set minimum requirements through directives in this regard.

While these rights are formally recognised across the EU, their **implementation and enforcement remain uneven**, particularly in **Central and Eastern European (CEE) countries**. The adoption of the EU social acquis was intended to support and reinforce social dialogue in new Member States. However, evidence from trade unions and workers’ representatives suggests that, while a **minimum level of information and consultation on transnational matters** is often observed under the European Works Council (EWC) Directive, **national-level IC rights** under Directive 2002/14/EC are frequently underused or disregarded, despite being legally binding. This discrepancy highlights the need for a deeper understanding of both the **legislative gaps** and **practical barriers** hindering the effective exercise of these rights.

The ETUC’s project “New horizons for Democracy at Work” intends to help bridging that gap. The project’s objectives include: (1) promoting internal exchange among trade unions and worker representatives on issues related to information, consultation, and participation (ICP) rights; (2) promoting workers’ involvement, workplace democracy, and social dialogue at company level across Member States; (3) facilitating effective communication strategies on workers’ rights, both internally and externally; (4) providing in-depth analysis of the current state of information and consultation rights in Central and Eastern European (CEE) countries.

Twenty years after the 2004 enlargement of the European Union (EU), this project seeks to conduct a critical assessment of the development and enforcement of IC rights in CEE countries. The focus lies particularly on rights enshrined in **Directive 2002/14/EC** and other relevant EU directives forming the EU’s social acquis on information, consultation, and participation.

The primary objective is to carry out a comprehensive stock-taking exercise, analysing how IC rights have evolved in the CEE region since accession. This involves examining the interaction between EU

legal frameworks and national-level implementation, with attention to the **transformations in labour markets, labour mobility, regional disparities, industrial restructuring, and enforcement challenges.**

The **policy paper** resulting from this work will present an overview of the status of IC rights in CEE countries, identify the specific national and regional challenges to their effective implementation, and evaluate the impact of two decades of labour market transformation. It will serve as a strategic foundation for communication, policy dialogue, and advocacy in favour of strengthening workers' rights in the region.

2. Tasks to be performed by the subcontractor

Objective:

To achieve these aims, the ETUC will **subcontract experts** through this call for tender to carry out an in-depth comparative study in **three selected CEE countries**. The experts will assess the enforcement of IC rights, analyse the role of labour mobility and market shifts, and conduct stakeholder interviews. They will also contribute to organising a one-day seminar and the drafting of a 25-page policy paper (in English and two other languages). The ultimate goal is to **identify actionable recommendations** that can support more effective application of ICP rights and inform future EU policy, particularly in the context of further enlargements and evolving socio-political dynamics.

Timeline:

The project has begun in September 2024 and concludes by 31 May 2026. The research that is subject of this call for tender must be fully completed by Q2 2026. The selection process will conclude right after the summer break 2025, the seminar should be organised in January 2026. Exact dates will be confirmed later, based on the availability of participating ETUC affiliates. Further details can be found under "Deliverables & Deadlines."

Key responsibilities and deliverables of the subcontractor

1. Policy Review

- Conduct a comprehensive review of relevant EU and national legislation, directives (notably Directive 2002/14/EC), and policy documents relating to ICP rights in CEE countries. A good overview of legislation is force primary relevant to this study can be found [here](#).
- Assess implementation gaps, enforcement mechanisms, and contextual factors affecting the development of ICP rights.

2. Development of Case Study

- Identify and propose **three CEE countries** for detailed case study analysis. Please provide a suggestion of potential countries to examine closer in your bid.
- Draft a **research questionnaire** to be used for stakeholder interviews and data collection.
- Coordinate with national trade union affiliates and relevant actors to gather qualitative and quantitative data. **In this regard, ETUC reserves the right to establish direct contact between the researcher and the individuals involved, primarily its affiliates.** Nevertheless, a good network of trade unionists and workers representatives will be appreciated.

- Engage in **extensive consultations** with experts, trade unionists, and other stakeholders to collect diverse input.

3. Seminar Preparation and Coordination

- **Design the content** for a one-day seminar on the development of ICP rights in CEE countries, scheduled for **January 2026**.
 - Structure: 1 panel discussion + 2 thematic workshops.
 - Location: Potentially Czech Republic or one of the Baltic countries.
 - Target audience: approx. 30 participants, including 20 representatives from national trade union affiliates, as well as ETUF and ETUC representatives.
- **Draft a briefing paper** to be circulated at least two weeks before the seminar, outlining key findings, discussion points, and objectives.
- **Documentation:** Take detailed notes on discussions, gather case studies, and collect examples of best practices shared by participants.
- Select an appropriate **methodology** to facilitate structured and inclusive discussion during the seminar.

4. Policy Paper

- **Draft a comprehensive Policy Paper** (25 pages) on the development of ICP rights in CEE countries, addressing:
 - Key challenges to the enforcement and realisation of ICP rights;
 - Core demands from trade unions and civil society;
 - Policy recommendations for EU and national actors;
 - Noteworthy practices or case examples that may serve as models.
- Format: Online publication, in **English and two additional languages** (to be specified). ETUC will take care of the translation.
- Ensure the policy paper reflects accurate, evidence-based analysis aligned with project objectives.

5. Review, Validation, and Dissemination

- Participate in **multiple review and feedback rounds** coordinated by the ETUC project team.
- Integrate feedback and ensure consistency, accuracy, and clarity in all deliverables.
- Report regularly on the **progress and advancement of the study** to the ETUC.
- Support the **dissemination** of the policy paper through appropriate channels to ensure visibility and impact at European and national levels.

Deliverables and Deadlines

1. **Policy Review Report (Deadline: October 2025)**
 - A comprehensive analysis of EU and national frameworks on ICP rights in CEE countries, including enforcement challenges and gaps.
2. **Case Study Proposal (Deadline: November 2025)**
 - Selection and justification of three CEE countries.
 - Draft questionnaire and methodological approach for stakeholder interviews.

3. **Seminar Content Package (Deadline: Early December 2025)**
 - Methodology proposal for structuring the seminar.
 - Briefing paper (4–5 pages) outlining key themes, findings, and guiding questions for discussion.
4. **Seminar on Development of ICP Rights in CEE Countries (Date: January 2026)**
 - One-day event in Czech Republic or the Baltic region.
 - Programme includes 1 panel and 2 workshops, with 30 participants (including national affiliates, ETUFs, and ETUC).
5. **Policy Paper on ICP Rights in CEE Countries – First Draft (Deadline: March 2026)**
 - Approx. 25 pages.
 - Includes analysis of challenges, demands, recommendations, and examples of best practices.
 - Based on stakeholder input and seminar outcomes.

3. Expertise, experience and skills required

The selection procedure will consider the knowledge of the Trade Union environment and previous experience with the identified topics.

ETUC Project team will monitor the work of the selected expert to ensure the clarity of the tasks and their timely implementation.

Sound expertise is required on the following issues:

- Expert knowledge of workers' information, consultation and participation rights;
- Good understanding of workers' involvement (both in national and European contexts);
- Experience in working on European level projects;
- Understanding or experience in working with European trade union movement. A sound network of trade unionists and workers representatives will be highly appreciated.

Sound experience is required in the following areas:

- Carrying out in-depth researches, including legal researches and overviews, preferably relating to workers' information, consultation and participation rights;
- Carrying out qualitative interviews;
- Writing research reports containing analysis of legal frameworks and meaningful policy recommendations;
- In this regard, an innovative proposal for the methodology of the seminar will be highly appreciated.

Skills required:

- Proven research and presentation skills (in English);
- Ability to do desk research in multiple languages
- Proven skills in drafting policy analysis;
- 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 respect the timeline mentioned under point 2. Seminar briefing notes must be delivered two weeks before each seminar, with post-seminar reports finalized within three weeks after each event. The exact date of the seminar will be communicated at a later stage. The **finalized** 25-page report – meaning after the feedback rounds – must be submitted by 31 May 2026.

The subcontractor will also be asked to participate in the online Steering Committee meetings of the project to report on progress of the study. , Committee meetings of the ETUC, the 4 seminars of the project as well as the final dissemination event. The dates will be discussed and decided together with the tenderer in the Steering Committee.

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"> • Policy review on ICP rights in CEE countries. • Selection of 3 case study countries and development of a research questionnaire. • Preparation and organisation of a 1-day seminar (Jan 2026, Poland/Baltic region; 30 participants). • Writing a 25-page Policy Paper (EN + 2 languages) with analysis, recommendations, and best practices. • Regular review meetings with ETUC project team and reporting on progress. 	
Total budget for the Expertise	20 000 € (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;
- The candidate is invited to include in the bid:
 - o a selection of potential countries for the case study together with an explanation why these countries could be further examined;
 - o a potential methodology for running the seminar in January.
- 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 information, consultation & participation & general employment policies.

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 20,000 (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 Wednesday 23 June 2025 and will be kept online for 39 calendar days. Offers must be sent at the latest on Saturday 1 August 2025 to ETUC, in electronic format (by e-mail to nfranke@etuc.org & amartin@etuc.org), and refer to our “Call for Tenders – Democracy At Work”.

The ETUC will confirm the date and time of receipt of each bid. The ETUC 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 ETUC 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 the ETUC 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.