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Tender Specifications for subcontracting external expertise for the project

*Education Trade Unions for the Teaching Profession.
Strengthening the capacity of education trade unions to represent teachers'
professional needs in social dialogue*

Agreement number: VS/2016/0248

Subcontracting external expertise for conducting research activity

Brussels, 15 December 2016

Ref: SF/AR/EE/9862

1. Background

The expert work to be carried out is part of the project **Education Trade Unions for the Teaching Profession. Strengthening the capacity of education trade unions to represent teachers' professional needs in social dialogue** (supported by the European Commission under the Call VP/2016/002 Information and training measures for workers' organisations, Budget heading 04.03.01.05).

ETUCE is the biggest European umbrella organisation of teacher trade unions. It has a membership of 131 national teacher unions in Europe and represents more than 11 million teachers at all levels of education (pre-primary, primary, secondary and higher education, vocational education and training). ETUCE is the European Region of Education International, the global umbrella organisation of teacher unions. In the EU/EFTA, ETUCE covers 110 organisations and represents more than 4.2 million teachers.

ETUCE is the representative voice of teacher unions in relation to the EU institutions. Its main objectives are to support teachers to strive for appropriate working conditions, e.g. workplace, working time, workload, social protection, gender equality, to represent the interest of teachers vis-à-vis the EU Institutions, to promote high quality education for all in Europe and to inform the national teacher unions and respective affiliates about the development in the EU policies in education and employment.

As a European Trade Union Federation of the European Trade Union Confederation (ETUC), ETUCE takes part in its activities as a social partner in the EU and achieved in 2010, alongside the European Federation of Education Employers (EFEE), the establishment of the European Sectoral Social Dialogue Committee for Education. In this forum representatives of national teacher unions and education employers in Europe meet regularly to discuss and commit to relevant education/employment

issues. Moreover, ETUCE is well linked to other relevant social partners, e.g. the European Public Services Union (EPSU), UNI-Europa, etc.

ETUCE has carried out several projects regarding the promotion of social dialogue in education, capacity building of teacher trade unions, and enhancement of knowledge and expertise through information and training measures for teacher union representatives across Europe, focusing in particular on the development of the teaching profession in times of crisis and on the European Semester. The most recent project in this field is “The development of the teaching profession in times of the economic crisis as a key task for social partners in education”. More information on the ETUCE projects is available at: www.csee-etuce.org.

This project seeks to build the capacity of education trade unions to represent teachers’ professional needs faced with challenges in relation to changes in employment and work, and to enhance teachers’ professional issues as a crucial matter of social dialogue in the education sector.

2. Purpose

ETUCE requires the Contractor, providing an external and objective scientific perspective and expertise on the issue at stake, to carry out a literature review and a map-out through on-line survey and support to the training workshops for the need of the following skills:

1. Experience with research on social partnership and industrial relations in education, as well as on the European governance (European Semester, etc.);
2. Proven experience with quantitative and qualitative analysis in the social field and regarding teaching profession and teachers’ initial and continuous professional development;
3. Understanding of teachers’ and teacher unions’ concerns as regards the changing nature of industrial relations in education as well as of the teaching profession;
4. Experience in conducting surveys/interviews in the education sector in English and French (additional three languages are strongly recommended and will be an asset).

The contractor contributes to the successful development of the project as a whole by actively participating in various project events. The project advisory group will be the body entitled to guide the project/research implementation as concerns its organisation and evaluation.

3. Tasks to be performed by the Contractor

The external expert in this project will have the following tasks:

1. Carry out a literature review on the representation of teachers' professional needs in social dialogue;
2. Develop, with the input from the project advisory group, the online survey among ETUCE member organisations (national teacher unions) in the EU, EFTA, EEA and candidate countries on the representation of teachers' professional need in social dialogue;
3. Conduct the survey by using preferential survey programme, considering 2 languages versions (English and French), and analyse the responses
4. Produce a survey report gathering the survey results in English to be presented in the Training Workshops and the Final Conference in June 2018
5. Contribute to the successful development of the project as a whole, by actively participating in four advisory group meetings
6. Prepare background documents for Training Workshops based on literature review and online survey results, including 3 short specific country cases (Italy, Germany, Poland)
7. Conduct interviews with participating organisations via phone and during the Workshops to obtain additional information not covered by online survey responses
8. Participate in three Training Workshops to present the draft survey results, support the ETUCE team in the trainings with specific expertise and integrate to the final report specific country cases emerged during the Workshops, as well as during the interviews
9. Participate in the Final Project Conference to present the main survey results

4. Payments and standard contract

A contract will be signed between ETUCE and the external expert.

The contract will refer to the Grant Agreement signed between ETUCE and the European Commission and will request for both parties the respect and accordance of all conditions included in the Grant Agreement.

Payment of the fees defined in the contract will be made in two instalments:

1. A first instalment amounting to 50% will be issued after signing the contract, during the second month of the action.
2. A second instalment of the remaining fees will be issued after completion, delivery of the final study report by the contractor and the approval thereof by ETUCE as defined in above items.

Payments will be done by bank transfers to a bank account for which the external expert will communicate the full details.

If the contractor does not fulfil his/her tasks and duties, the contract may be cancelled.

The contract may not be transferred without the parties' written agreement.

5. Price

5.1 Agreed amount

Subject to change by the European Commission in the final Grant Agreement which is to be established between the European Commission and ETUCE for the purpose of this project, the total amount that the expert will receive in compensation for the tasks described here above during the project lifetime (01/11/2016 – 31/10/2018) will be of maximum 15.750,00 € **including all taxes** (such as, e.g. VAT).

5.2 Other arrangements

Expenses: The expert will be reimbursed, on receipt of full documentation according to European Commission requirements, the travel – economy flight and train tickets - and accommodation expenses – and transfer to and from airport (by public transportation, taxis not reimbursed) for his/her participation in the advisory group meetings, the training workshops and the final project conference as project expert. These activities will be those previously set out in the Description of the Action - Annex 1 of the grant agreement - only subject to the changes that may be decided by the advisory group.

Project data use: The ETUCE accepts that the expert is free to use all the data collected and the reports written in this project as part of his/her own academic reports and articles, as long as he/she includes the relevant reference to the ETUCE project.

6. Selection criteria

The selection will be based 1) on acceptance of the price offering the best price-quality ratio and 2) on the availability during the 24 months project for the requested tasks. The external expert will be selected according to the standards of selection that have been developed by ETUCE. Main selection criteria are the expertise and capacity to deliver the work tendered for, the price-quality relation, the methodological quality and the tenderer's experience in the field of education policy, industrial relations and social dialogue in Europe.

7. Award criteria

The contract will be awarded to the tenderer whose offer represents the best value for money, taking into account the following criteria:

1. Evidenced track record of research and/or experience as a project expert in the field of education policy, industrial relations and social dialogue in Europe
2. Language capacity
3. Understanding of the nature of the assignment
4. Capacity to work in a team project
5. Ability to meet deadlines
6. Ability to meet budget allowance
7. Availability to attend meetings

8. Content and presentation of the bids

8.1 Content of the bids

The bids should contain a detailed explanation of the qualifications and the expertise of the potential contractor, e.g. information on references from the contractor on similar projects already handled, to demonstrate his/her experience and capability to succeed in performing the tasks as set out in item 3 of this tender. The bids should include a detailed description of the methodology and tools applied to implement the research project as well as a project plan with detailed time and cost planning.

The external expert is requested to send a budget listing the costs by task including a fair estimation of the number of working days and the number of people participating in the tasks.

8.2 Presentation of the bids

Replies have to be presented by 20 January 2017 the latest to:

ETUCE

Subject:

Education Trade Unions for the Teaching Profession. Strengthening the capacity of education trade unions to represent teachers' professional needs in social dialogue

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