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ETUCE

European Trade Union Committee for Education EI European Region

Tender Specifications for subcontracting external expertise for the project

Social dialogue and gender equality: Empowering education trade unions to address gender equality in the teaching profession through social dialogue

Agreement number: **VS/2017/0323**

Subcontracting external expertise for conducting research activity

Brussels, 12 December 2017

Ref: SF/EE/9925



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1. Background

The expert work to be carried out is part of the project “**Social dialogue and gender equality: Empowering education trade unions to address gender equality in the teaching profession through social dialogue**” (supported by the European Commission under the Call VP/2017/002 Information and training measures for workers’ organisations, Budget heading 04.03.01.05).

ETUCE, the European Trade Union Committee for Education, represents 111 education organisations in the EU/EFTA countries and 21 education organisations in the rest of 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 education unions.

ETUCE is a Social Partner and the representative voice of education trade unions in Europe. 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 education unions and respective affiliates about the development in the EU policies in education and employment.

In 2010, ETUCE together with the European Federation of Education Employers (EFEE) established the European Sectoral Social Dialogue Committee for Education. In this forum representatives of national education 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 is also a European Trade Union Federation within the European Trade Union Confederation (ETUC).

ETUCE has carried out numerous projects regarding the promotion of gender equality in education and in the teaching profession, capacity building of education trade unions, and enhancement of knowledge and expertise on the issues of gender equality through information and training measures for education trade union representatives across Europe. The most recent project in this field is "Promoting gender equality within teacher trade unions and in the teaching profession II – Implementing and reinforcing teacher trade union actions on gender equality in times of austerity". More information on the ETUCE projects is available at: www.csee-etu.org.

The present ETUCE project seeks to build the capacity of education trade unions to address the challenges of gender inequality through enhanced social dialogue in the education sector at national, regional and institutional level and to improve education trade unions' understanding of gender equality issues. The project also aims at raising awareness on the need to strengthen social dialogue at national and European level on gender equality in the education sector with the aim to enhance the professional profile of teachers, trainers and school leaders and to make the teaching profession more attractive for both men and women.

2. Purpose

ETUCE requires the Contractor, providing an external and objective scientific perspective and expertise on the issue at stake, to carry out a desk research and a mapping through an education trade union online survey and participation in the training workshops for the need of the following skills:

1. Experience with research on gender equality issues (at European and national level), in particular, on such issues as sectoral segregation on the labour market, work-life balance, career development and recognition, gender pay and pension gaps, gender stereotypes, and gender inequality in decision-making.
2. Understanding of teachers and education unions' concerns as regards the national transposition and implementation of the European Commission's strategic engagement for gender equality 2016-2019;
3. Proven experience with quantitative and qualitative analysis in the social field, including research on social partnership and social dialogue in the public sector;
4. Experience in conducting surveys/interviews in the education sector in English and French (Russian as additional third language is strongly recommended).

The Contractor contributes to the successful development of the project as a whole by actively participating in various project events. The project advisory group is 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 has the following tasks:

1. Carry out a desk research and a literature review on gender equality in the teaching profession in Europe and its main challenges (based on ETUCE, EIGE, ETUC, and other relevant studies);
2. Develop, with the input of the project advisory group, an online survey among ETUCE member organisations (education trade unions) in EU, EFTA, and candidate countries, on how education trade unions represent gender equality issues in social dialogue and collective bargaining, with a practical focus on concrete tools and practices to address the challenges of gender inequality in the education sector using different social dialogue instruments;
3. Conduct the online survey, considering 3 languages (English, French and Russian), and analyse the responses;
4. Produce a research report in English gathering the survey results and data collected during the desk research to be presented in the training workshops (January, February, and March 2019) and the project closing conference in September 2019;
5. Contribute to the design of the online database of education trade unions' good practices in mitigating gender segregation and improving gender equality in the teaching profession by using social dialogue instruments;
6. Contribute to the successful development of the project as a whole, by actively participating in five advisory group meetings;
7. Participate in three training workshops to present the draft research results, support the ETUCE team in the trainings with specific expertise and integrate in the final research report specific country/education trade union cases emerging from the workshops;
8. Participate in the project closing conference to present the main research results.

4. Payments and standard contract

The contract signed between ETUCE and the Contractor is subject to the Grant Agreement signed between ETUCE and the European Commission for this project initiative.

Payment of the fees defined in the contract will be made in two instalments dependent on the expert carrying out the relevant stages of work as listed above:

1. The first instalment amounting to 50% will be issued after signing the contract.
2. The second instalment of the remaining payment is to be paid to the Contractor on the successful completion of the activities, delivery of the final study report 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 Contractor will communicate the full details.

The contractual agreement is based upon and regulated by the European Commission's rules, provisions and requirements as set out in the project agreement with the European Commission, DG EMPL and Belgian law. The Contractor is obliged to fulfil the described tasks and duties of work to receive the final payment according to the contract.

ETUCE has the right, based on Belgian Law, to terminate the contract when the Contractor cannot perform the agreed tasks and duties accordingly.

Any conflicts of interests or disputes concerning the validity of this arrangement, the construction of its terms, and the interpretation of the rights and duties of the parties in the contract shall be governed by Belgian Law.

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

5. Price

5.1 Agreed amount

Subject to the Grant Agreement 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 (01/12/2017 – 30/11/2019) will be of a maximum of 25.000,00 € **including all taxes** (such as, e.g. VAT).

5.2 Other arrangements

The expert is solely responsible for the payment of all expenditures or external support/cooperation proceeding from the tasks allocated to the expert.

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

Project data use: ETUCE accepts that the expert is free to use 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.

However, in order to respect the regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data, the Contractor must process personal data under the agreement in compliance with applicable EU and national law on data protection (including authorisations or notification requirements).

The Contractor may grant its personnel access only to data that is strictly necessary for implementing, managing and monitoring the agreement.

The Contractor must adopt appropriate technical and organisational security measures having regard to the risks inherent in the processing and to the nature of the personal data concerned.

6. Selection criteria

The selection will be based 1) on acceptance of the price offering the best price-quality relation and 2) on the availability during the two-years project for the requested tasks. The Contractor 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 with quantitative and qualitative data analysis in the field of equal opportunities in the education sector.

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 equal opportunities in the education sector and social dialogue in Europe
2. Language capacity
3. Understanding of the nature of the assignment
4. Capacity to work in a team
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 (see provisional project timetable in Annex).

The Contractor 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. If the Contractor has a team of researchers participating in the tasks, ETUCE would prefer one and the same expert attending the project meetings.

8.2 Presentation of the bids

Replies have to be presented by **10 January 2018** the latest to:

ETUCE

Subject:

Social dialogue and gender equality

Bd. du Roi Albert II, 5, 9th floor, B-1210 Brussels, secretariat@csee-etuce.org

Annex.

ETUCE project “Social dialogue and gender equality: Empowering education trade unions to address gender equality in the teaching profession through social dialogue”

Description of the Action

Name of the activity	Time
Meeting with research expert; Research experts start working on draft Survey questions and desk research resources	18 January
1 st AG meeting (Brussels)	22 January 2018
2 nd AG meeting (Brussels)	12 March 2018
Translation of the online survey	April 2018
Launch of the online survey and desk research; collection of replies	9 April 2018
Closing of online survey and analysis of the outcomes	14 September 2018
3 rd AG meeting (Brussels)	15 October 2018
1 st Training workshop	14-15 January 2019
4 th AG meeting (right after the training workshop)	15(16) January 2019
2 nd Training workshop	25-26 February 2019
3 rd Training workshop	28-29 March 2019
5 th AG Meeting (Brussels)	15 April 2019
Production of the final research report	29 April 2019
Launch of online database of education unions’ good practices	17 June 2019
Final conference in Bucharest	16-17 September 2019
6 th AG meeting (Brussels)	7 October 2019