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Tender Specifications for subcontracting an external expertise for the project

European Sectoral Social Partners in Education promoting effective integration of migrants and refugees in education,

Agreement number: VS/2017/0368

Subcontracting external expertise for research study on effective measures at European, national, regional and local level and amongst education personnel (teachers, trainers and school leaders) to support the integration of migrants and refugees in education, focusing in particular on joint social partner initiatives

Brussels, 12 December 2017

SF/pc/9924

1. Background

The expert work to be carried out is part of the project “European Sectoral Social Partners in Education promoting effective integration of migrants and refugees in education” (supported by the European Commission under the Call VP/2017/001 Industrial Relations and Social Dialogue, Budget heading 04.03.01.08.), a two year initiative ending on 30/11/2019.

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 other projects in the context of the European sectoral social partnership in education. The most recent projects dealt with social dialogue capacity building, but also with other topics relevant to the European sectoral social partners in education such as the development of the teaching profession in Europe during the time of the economic crisis or recruitment and retention in the education sector. More information on the ETUCE projects is available at: www.csee-etu.org.

This project is meant to continue sustainably on the work that ETUCE and EFEE have accomplished in previous ESSDE Working Groups on the key role of the education social partners in addressing refugees' and migrants' integration into the education and socio-economic environment of the host countries across the EU and EU-candidate countries. Further to contributing to the implementation of a specific theme of the current ESSDE Work program, the project regards the promotion of social dialogue, demographic challenges and follows-up on the joint work on improving the support to educators dealing with students from migrant origin, including continuous professional development. In its aim to support the commitment of the social partners for facilitating an effective integration of refugees and migrants of all ages in the education system of a host country, ETUCE and EFEE directly support the implementation and follow-up of the Paris Declaration, contributing to promoting intercultural dialogue and democratic citizenship in education and training in general, as well as to prepare education institutions for a successful integration of students of migrant origin in education including the competencies of teachers, educators and school leaders.

2. Purpose

ETUCE requires a contractor, providing an external and objective scientific perspective and expertise on the issue at stake, to carry out the case studies in the target countries for the need of the following skills:

1. Experience with research on migration and social issues, such as EU and national agenda on migration, asylum and integration of third-country nationals, social dialogue and industrial relations, education policy;
2. Experience in conducting surveys/interviews in the education sector in English (other additional languages are an asset);
3. Understanding of the concerns of employees and employers in the education sector as regards the needs of education institution to prepare and cater for the specific needs of migrants and refugees, e.g. through language acquisition, psychosocial counselling and intercultural competences;
4. Understanding of social partners joint initiatives at national and European level.

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 contractor in this project will have the following tasks:

1. To conduct desk research on existing legislation, special programmes and arrangements, initiatives and good practices, including identifying existing barriers and effective joint social partners' initiatives to foster migrant and refugee children and learners' integration in education at all levels;
2. To develop, with the input from the project advisory group, questions for the short online survey among ETUCE and EFEE member organisations, national education trade unions and organisations of education employers;
3. To conduct the online survey within the period of March 2018 to May 2018 and the subsequent analysis of the replies;
4. To develop, with the input from the project advisory group, interview questions for the case studies at local level, amongst education staff (teachers, trainers and school leaders) to identify practical, concrete ways to support the integration of migrants and refugees in education, focusing in particular on joint social partner initiatives;
5. To scientifically consult the organisation and accomplishment of the case studies in Spain, Serbia and Belgium;
6. To produce a research report gathering the desk research and case study results in English (60 pages);
7. To contribute to the successful development of the project as a whole, by actively participating in five advisory group meetings;
8. To participate in the training seminars and in the final conference of the project 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. A second instalment of the remaining fees will be issued after completion, delivery and approval by ETUCE of the final report

Payment will be done by bank transfer to a bank account for which the external expert will communicate the IBAN and BIC.

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 applicable 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 applicable 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 maximum 35.000,00 € 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 preparatory meeting, advisory group meetings, case study visits and training seminars and the final project conference as project expert. These tasks are those previously set up in the Description of the Action 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 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 and indicates that the action has received funding from the European Union and shall display the European Union emblem in respect of Articles II.11.1 and II.8 of the Grant Agreement.

However, In order to fulfil or 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 ratio and 2) on the availability during the two-year project for the requested tasks. The Contractor is 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 data analysis in the field of social dialogue in the education sector and migrants' integration. It should be noted that the contract will not be awarded to a tenderer who receives less than 70% on the award criteria.

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. Evidence track record of research and/or experience as a project expert in the field of migration and social issues and/or educational issues
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 on 17 January 2018 at the latest:

ETUCE

Subject: External expertise for **European Sectoral Social Partners in Education promoting effective integration of migrants and refugees in education**

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Annex

“European Sectoral Social Partners in Education promoting effective integration of migrants and refugees in education”

Calendar of the actions

Project activity	Date(s) proposed
1st Advisory Group meeting, Brussels	January 2018
1st case study, Spain	May 2018
2nd case study, Serbia	September 2018
3rd case study, Belgium	November 2018
2nd Advisory Group meeting, Brussels	January 2019
1st Training Seminar, Denmark	March 2019
2nd Training Seminar, Cyprus	June 2019
3rd Advisory Group meeting, Brussels	September 2019
Project Closing Conference, Brussels	October 2019
4th Advisory Group meeting, Brussels	November 2019