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# ETUCE

**European Trade Union Committee for Education  
EI European Region**

## **Tender Specifications for subcontracting an external expertise for the project**

**'YOUR TURN! Teachers for Trade Union Renewal'**

**Agreement number: VS/2018/0358**

**Subcontracting external expertise to carry out**

**research activity**

Brussels, 03 December 2018

SF/pc/10016

### **1. Background**

The expert work to be carried out is part of the project *"YOUR TURN! Teachers for Trade Union Renewal"* (supported by the European Commission under the Call VP/2018/002 Information and training measures for workers' organisations, Budget heading 04.03.01.05), a two year initiative ending on 15/11/2020.

ETUCE, the European Trade Union Committee for Education, represents 110 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).

With a view to quality and inclusive education, this project seeks to build the capacity of education trade unions to address changes in employment and work of teachers and educators, and to enhance the representation of their needs within their structures as well as within national industrial relations systems. This project is meant to improve knowledge and expertise on a crucial issue such as terms of employment, quality jobs, contractual status and career prospect, and it addresses the main challenges to quality and inclusive education, as stressed by the European Pillar of Social Rights.

More information on the ETUCE projects is available at: [www.csee-etu.org](http://www.csee-etu.org).

## **2. Purpose**

ETUCE requires a Contractor (research expert), providing an external and objective scientific perspective and expertise on the link between quality employment terms for teachers and educators (especially those that are new to the profession) and quality of education across Europe, as well as on the key role of education trade unions to represent their needs within social dialogue and collective bargaining settings, as well as by using the information received from the project Advisory Group. This task requires the following skills:

1. Experience with research on industrial relations in education, as well as on the European governance and policy making (e.g. European Semester, etc.);
2. Proven experience with quantitative and qualitative analysis in the social, employment and labour market field;
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 and the quality of jobs in education;
4. Experience in conducting surveys/interviews in the education sector in English and French (additional third language is strongly recommended and will be an asset);
5. Understanding of social partners and their concerns and in particular with regards to employment terms, attractiveness of the teaching profession and/or the education sector.

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 carry out a desk research and a literature review on terms and conditions of employment in the education sector across Europe;
2. To develop, with the input from the project advisory group, research questions to be addressed to ETUCE member organisations (through surveys or direct interviews) on current practices, policies and procedures related to employment and quality jobs in the education sector;

3. To identify the main trends, analyse the impact of labour market reforms and educational reforms on the changing employment terms of teachers and educators across Europe, taking into consideration the age-ranges and the status of teachers (new or experienced) as well as the evolution of terms of employment and the use non-standard employment contracts in education;
4. To carry out, through surveys, targeted interviews and/or literature review, the analysis of education trade unions' member composition, including union density and collective bargaining coverage, age, gender, and ethnic group, involvement in social dialogue and policy reforms, its main evolution over time and since the economic crisis (based on ETUCE, Eurofound, and other relevant studies);
5. To analyse the information gathered for the results to be presented in the Training Workshops and in the form of a final report in the Final Conference in September 2020;
6. To contribute to the successful development of the project as whole, by actively participating in two advisory group meetings;
7. To participate in the Kick-off conference to collect policies, practices and challenges emerging from the national education trade unions on terms and conditions of employment, in the three Training Workshops to present the draft research results, support the ETUCE team in training with specific expertise and integrate the report with specific issues emerged if needed and with the training methodology;
8. To participate in the Final 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. A first instalment amounting to 50%, issued after signature of the contract during the second month of the action;
2. A second instalment for the remaining payment issued after completion, delivery and approval by ETUCE of the final outcome.

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 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 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 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 (15/11/2018 – 15/11/2020) will be of maximum 35.000,00 € including all taxes (such as, e.g. VAT).

### 5.2 Other arrangements

**Expenses:** The expert is 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 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.

**Processing personal data:** The contracting party accepts that the contractor is free to use the data collected and the reports written in this project as part of their own academic reports and articles, as long as they include the relevant reference to the project.

However, in order to respect the modernized Convention 108 (the regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000) and EU General Data Protection Regulation (GDPR) 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 work experience.

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 professional experience with audio-visual production and post-production in the field of migration and social issues and/or educational issues (at European and national level)
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 activity 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 20 December 2018 at the latest:

ETUCE

Subject: External expertise for **YOUR TURN! Teachers for Trade Union Renewal**

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**Annex**

***“YOUR TURN! Teachers for Trade Union Renewal”***

**Calendar of the actions**

<b>Project activity</b>	<b>Date(s) proposed</b>
<b>1<sup>st</sup> Advisory Group Meeting</b>	January 2019
<b>Kick-off Conference</b>	February 2019
<b>2<sup>nd</sup> Advisory Group Meeting</b>	June 2019
<b>1<sup>st</sup> Training Workshop</b>	October 2019
<b>2<sup>nd</sup> Training Workshop</b>	December 2019
<b>3<sup>rd</sup> Training Workshop</b>	February 2020
<b>3<sup>rd</sup> Advisory Group Meeting</b>	April 2020
<b>Closing Conference</b>	September 2020
<b>4<sup>th</sup> Advisory Group Meeting</b>	September 2020