

#### **ETUCE Call for tenders to**

# Subcontract external research expertise on Artificial Intelligence and Education EU-Project 101192257 — Balancing AI in EDU

Brussels, 19 December 2024 ND/mdr/10409

This call for tender is open to applications from **7 January until 7 February 2025 (midnight, Brussels time**).

# 1. Background and information on the project

The present ETUCE call for tender is meant to subcontract external research expertise on artificial intelligence and education.

The European Trade Union Committee for Education, ETUCE, is a federation of 123 education trade unions in 51 countries and represents more than 11 million teachers at all levels of education (preprimary, primary, secondary, and higher education, vocational education, and training). ETUCE is the European Region of Education International, the global umbrella organisation of education unions, and European Trade Union Federation within the European Trade Union Confederation (ETUC).

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 visà-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.

The expert work to be carried out is part of the ETUCE project "Balancing AI in EDU - Strengthening education trade union capacity for collective bargaining and advocacy on Artificial intelligence".

The project is a 24-month initiative co-funded by the European Commission.

Project period: 1st January 2025 – 31 December 2026.

The project is developed in a context where education has been marked by an unprecedented increase in the use of artificial intelligence systems in recent years. However, the rapid technological advancement poses not only promises but also significant challenges for education workers and students alike. While artificial intelligence and education (AIEd) has been the subject of academic research for decades, significant gaps persist in understanding how AI impacts teachers and education personnel at all levels of education, their rights, and working conditions.

Additionally, the integration of AI systems in education, accelerated by the abundance of easily accessible AI systems, has yet to be accompanied by thorough strategies at the institutional and school



levels to ensure that AI systems truly respond to teachers' professional needs and students' pedagogical needs. Besides, impact assessments and monitoring systems are lacking regarding the benefits and challenges that AI systems bring about on education workers and students.

Whereas numerous national and European regulations apply to the use of AI systems and data protection, these measures do not provide a complete framework of protection for education workers. Besides, uncertainties and doubts remain concerning their concrete application, especially for those legislative measures that still have to enter into force fully.

Addressing the impact of artificial intelligence systems in education requires a comprehensive approach that also involves education workers and their unions in the decision-making processes.

Against this backdrop, the ETUCE project *Balancing AI in EDU* aims to strengthen the capacity of education trade unions to foster collective bargaining and exercise more effective advocacy actions on AI and education at the national and European level.

# The specific objectives of the project are:

- 1. Mapping existent policies on AI and education at European and national levels and the degree of education trade unions' involvement in their design, implementation, and monitoring.
- 2. Analysing the current use and implementation of AI systems at all levels of education and their opportunities and challenges on working conditions, education pedagogies, quality of work, and work-life balance of teachers, academics, researchers, and other education personnel.
- 3. Identifying the role of existing regulatory measures and possible collective agreements at the European and national level in addressing the impact that AI systems have on education workers (e.g., workload, working time, professional autonomy, performance management, work-life balance, occupational health and safety; data security and privacy, copyright) and identifying the areas on which further education trade union action is required.
- 4. Improving the capacity of education trade unions to address the challenges arising from the use of AI in the education sector and ensure better protection of work-related rights of education workers by:
  - a) Strengthening the collective bargaining capacity for AI and education advocacy by developing specific demands towards national and European regulation authorities, education authorities, and policymakers.
  - b) Strengthening education trade union capacity for advocacy in the field of AI and education, by developing specific demands towards national and European regulation authorities, education authorities, and policy makers.
- 5. Fostering mutual learning and information exchange among education trade unions, facilitating the dissemination of effective strategies for leveraging AI systems in education while proactively addressing challenges that may arise for education workers.

More information on the ETUCE projects is available at: www.csee-etuce.org.



## 2. Purpose of the contract and service to be provided by the subcontractor

In the framework of the project, subcontracted research expert(s) will provide an external and objective scientific perspective and high-level expertise on the artificial intelligence systems and related education policies as well as to assess their impact on teacher and education personnel at all levels of education. The experts will work on the preparation of a desk research and an online survey to be conducted among ETUCE member organisation. The desk research aims to enable a comprehensive understanding of existing policies, regulatory measures, and the current use of AI systems in the education sector across Europe. It further assists in identifying gaps and challenges that require attention during the projects. The online survey among ETUCE member organisations at the national level provides in-depth insights into the current involvement of education trade unions in AI policy design, implementation, and monitoring. The online survey further serves to gather education trade unions' actions on AI and Education and as a complement to the desk research/literature review to map existing policy and regulatory measures at a national level. This research work will result in the final research report. The research result will further be gathered by ETUCE to develop an online virtual mapping on existing national policy on artificial intelligence in education.

Specifically, the Subcontractor in this project will have the following tasks:

## 1) Drawing up and managing the online survey (T2.1)

- a) Elaborating the draft online survey in English.
- b) Collecting of the answers from ETUCE member organisations.

# 2) Setting up and analysing the survey dataset (T2.2)

- a) Setting up of the dataset for the analysis of the survey results (the latter will be in English, French and Russian).
- b) Analysing and summarising the survey results.
- c) Organising the results of the survey in an online repository.
- d) Presenting the survey results to the project partners and Steering Group and discussing their implementation into the project activities and final research report including practical guidelines.

#### 3) Conducting the desk research (T2.3)

- a) Conducting desk research on the impact of AI in education and existing policies on AI and Education in consultation with the ETUCE Secretariat and the project's Steering Group.
- b) Presenting the desk research results to the Steering Committee and relevant project's activities (e.g., conferences, training activities, Steering Committee).

#### 4) Preparing the final research report (T2.4)

a) Discussing the objective and the structure of the final research report with ETUCE, in consultation with the Steering Group.



- b) Drafting the research report in cooperation with ETUCE based on the findings of the online survey, desk research, and mid-term conference.
- c) Presenting the draft final research report to the project leaders and the project Steering Group.
- d) Finalising the final research report in English (60-70 pages).
- e) Producing a 2/3-page executive summary with the main insights of the final research report.

## 5) Supporting and informing the project activities (T2.5)

- a) Participating in the project Steering Group meetings. Six meetings are planned throughout the 2-year project (four online and two in person meeting). Additional meeting could be organised on ad hoc basis if it is necessary to ensure a smooth implementation of the initiative.
- b) Contributing to the project activities (mid-term Conference; two training workshops; the final Conference) by supporting the preparation of possible background documents, animating relevant sessions; presenting the results of the project research.
- c) Gathering inputs of education trade unions during the main project activities (project activities (mid-term Conference; two training workshops) to feed into the project's final research report.

# 3. Time schedule and reporting

The following table describes the timetable for the project implementation. The subcontractor is expected to deliver outcomes of the research in accordance with the timetable here below.

Additional details concerning the tasks to be performed by the Subcontractor will be agreed upon at the moment of the contract signature.

The exact dates of the other project activities will be determined by the Steering Committee in January 2025.

The project Steering Group is the body entitled to guide the project and the research implementation as concerns it organisation and evaluation.



| PROJECT YEAR YEAR 1                         |     |     |     |     |     |     |     |     |     |         |         |         | YEAR 2 |     |     |     |     |     |     |     |     |         |         |         |  |
|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------|---------|---------|--------|-----|-----|-----|-----|-----|-----|-----|-----|---------|---------|---------|--|
| ACTIVITY                                    | M 1 | M 2 | M 3 | M 4 | M 5 | M 6 | M 7 | M 8 | M 9 | M<br>10 | M<br>11 | M<br>12 | M 1    | M 2 | M 3 | M 4 | M 5 | M 6 | M 7 | M 8 | M 9 | M<br>10 | M<br>11 | M<br>12 |  |
| Steering Group meetings                     |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| subcontractor selection/ contract signature |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| Online survey   draft phase                 |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| Online survey   roll-out                    |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| Survey dataset analysis                     |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| Desk research                               |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| Final research report                       |     |     | П   |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| Mid-term Conference - Denmark               |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| 1st training workshop - Georgia             |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| 2nd training workshop - Ireland             |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| Guide for edu trade unions                  |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |
| Final Conference (Portugal)                 |     |     |     |     |     |     |     |     |     |         |         |         |        |     |     |     |     |     |     |     |     |         |         |         |  |



## 4. Expertise, experiences, and skills required

ETUCE requires the Subcontractor to provide an external and objective scientific perspective and expertise on the issue at stake, to carry out a literature review, desk research and to map-out through contacts with education trade unions and participation in mid-term conference, the training workshops, and the closing conference, to have the following skills:

- Research expertise on addressing the impact of artificial intelligence and new technologies in education.
- Experience with research on education policy making and/or industrial relations in the education sector.
- Proven experience with quantitative and/or qualitative analysis in the social field, particularly in the education sector.
- Understanding education trade unions' needs on addressing the impact of artificial intelligence in the education sector.
- Ability to meet budget allowance.
- Ability to meet deadlines and ensure participation in the project activities.
- Management experience in a project team, preferably, for EU-funded projects.

## 5. Payments and standard contract

The contract signed between ETUCE and the Subcontractor 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 the contract signature and the submission of a duly filled-in invoice.
- 2. A second instalment for the remaining payment issued after completion, delivery, and approval by ETUCE of the final outcomes upon submission of a duly filled-in invoice.

Payments will be done by bank transfers to a bank account for which the Subcontractor 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 Subcontractor 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 cannot 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 (01/01/2025 – 31/12/2026) will be of maximum **48.750,00** € 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 unit costs, the travel – economy flights and train tickets – and accommodation expenses, and transfer to and from airport (by public transportation, taxis not reimbursed) for the participation of 1 person in the preparatory meetings, Steering group meetings, mid-term conference, training workshops final project conference as a 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 Steering Group.

However, any additional expenses necessary for implementing the research services and if necessary, any extra travelling people must be included in the budget proposed by the Subcontractor in the bid which will not exceed 48.750,00€ all taxes included.

*Processing personal data*: The contracting party accepts that the subcontractor 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, to respect the modernised 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 regarding the processing of personal data by the Community institutions and bodies and on the free movement of such data:

- The Subcontractor must process personal data under the agreement in compliance with applicable EU and national law on data protection (including authorisations or notification requirements);
- The Subcontractor may grant its personnel access only to data that is strictly necessary for implementing, managing, and monitoring the agreement;
- The Subcontractor 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

All received bids are analysed against the evaluation grid based on the outlined requirements.

The selection will be based on:

- 1) 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 contract will be awarded to the tenderer whose offer ensures the best value for money and no conflict of interest, considering the following award criteria:

- 1. Evidence tracks record of professional experience with research in the field of industrial relations and/or educational issues (at European and national level)
- 2. Evidence tracks record of professional experience with research in the field of Artificial Intelligence/ new technologies and education (at European and national level)
- 3. Language capacity to work in English (C2 level is required). Proficiency in any of the other ETUCE official languages (French, Russian, Spanish, and Germany) would be an asset.
- 4. Understanding of the nature of the assignment
- 5. Capacity to work in a team project
- 6. Ability to meet deadlines
- 7. Ability to meet budget allowance
- 8. Availability to attend meetings

It should be noted that the contract will not be awarded to a tenderer who receives less than 70% on the award criteria.

## 7. Content and presentation of the bids

#### 7.1 Content of the bids

The bids should contain a CV and a portfolio with a detailed explanation of the qualifications and the expertise of the potential subcontractor, (e.g. information on references from the subcontractor on similar projects already handled, to demonstrate their experience and capability to succeed in performing the tasks as set out in 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 (in EURO).

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 and those extra travelling if necessary.

The tender bid must be drawn up in accordance with all the tender requirements set out in this call for tender. They must be accurate and concise and clearly show the tenderer meets the requirements and is able to provide the services on the terms stipulated.



#### 7.2 Presentation of the bids

Replies must be presented electronically via email by 7 February 2025 (midnight, CET) at the latest to:

**ETUCE** 

Subject: External Research expertise for EU Project 101192257 — Balancing AI in EDU

Bd. Bischoffsheim 15, 6th floor

1000 Brussels, Belgium

to: <a href="mailto:sec-etuce.org">secretariat@csee-etuce.org</a>; cc: <a href="mailto:martina.diridolfo@csee-etuce.org">martina.diridolfo@csee-etuce.org</a>;

#### 8. Selection of the bids

The evaluation and selection of the bids will be made by the ETUCE Secretariat in consultation with the project Steering Group in accordance with the requirements set out in this call **by the end of February 2025**.

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