



Education International
Internationale de l'Éducation
Internacional de la Educación

<http://www.ei-ie.org>

EUROPEAN REGION- ETUCE

President

Christine BLOWER

Vice-Presidents

Odile CORDELIER
Andreas KELLER
Trudy KERPERIEN
Dorte LANGE
Galina MERKULOVA
Branimir STRUKELJ



5, Bd du Roi Albert II, 9th
1210 Brussels, Belgium
Tel +32 2 224 06 91/92
Fax +32 2 224 06 94
secretariat@csee-etuice.org
<http://www.csee-etuice.org>

European Director

Susan FLOCKEN

Treasurer

Mike JENNINGS

ETUCE

European Trade Union Committee for Education EI European Region

Tender Specifications for subcontracting an external expertise

For the project

**“European Sectoral Social Partners in Education striving for sustainable influence on European education policy building through successful social dialogue. The ESSDE capacity building project III”,
Agreement number: VS/2016/0438**

Subcontracting external expertise for the for the development and implementation of training on the European social dialogue

Brussels, 04/01/2016

Ref: SF/PC/9863

1. Background

The expert work to be carried out is part of the project “*European Sectoral Social Partners in Education striving for sustainable influence on European education policy building through successful social dialogue. The ESSDE capacity building project III*” (supported by the European Commission under the Call VP/2016/001 Industrial Relations and Social Dialogue, Budget heading 04.03.01.08.), a two year initiative ending on 31/12/2018.

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

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 & 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 other projects in the context of the European sectoral social partnership in education. The most recent projects dealt already 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.

2. Reasons for contracting out implementation work

ETUCE requires a Contractor, providing an external and objective scientific perspective and expertise on the issue at stake, to work on the preparation and successful implementation of the round table meetings and the other mentioned project activities. The ideal candidate will have the following skills:

1. Thorough knowledge of and practical experience with social dialogue (at European and national level);
2. Knowledge on and experience with occupational and social issues (at European and national level);
3. Experience in knowledge transfer preferably in the area of the social dialogue;
4. Preferably understanding of teachers and teacher unions' and education employers' concerns as regards the contents and quality of the dialogue in the European Social Dialogue for education (at European and national level);
5. Knowledge about the European social dialogue as a key element of the European social model including the actors, the development and the current challenges;
6. Understanding of the social partners' concerns at European level as regards the impact of the demographic challenges, the economic and refugee crises on teachers in Europe in all sectors of education, with a particular focus on the gender dimension and the status of the teaching profession;
7. Knowledge about the European Union, its functioning and the benefits of social lobbying;
8. Understanding of the overarching EU employment and social policy challenges as laid down in the Europe 2020 Strategy [and its flagship initiatives] and the Commission's Communication on the Renewed Social Agenda.

The contractor will contribute to the successful development of the project as a whole by actively participating in the advisory group meetings which will be held exclusively in English. The advisory group will be the body entitled to guide the project 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. Develop, with the input from the project advisory group, a training day program on the sectoral and cross-sectoral social dialogue at European and national level, with a particular focus on the topics of the ESSDE work programme as well as on related issues for round table meetings in eight EU member states. Each program will be specific to the country the action is implemented in;
2. Give presentations on mentioned and selected topics at each of the eight round table meetings;

3. Produce and compile, with the input from the project advisory group, additional work material relevant for the future work and further promotion of the European Sectoral Social Dialogue in Education (ESSDE);
4. Draft the final report (10 pages) taking into consideration information from the round table meetings, desk research as well as the outcomes of the previous two ESSDE capacity building projects carried out by ETUCE;
5. Contribute to the successful development of the project as a whole, by actively participating in the advisory group meetings if needed;
6. Participate in the closing conference of the project to present on the topics and the lessons learned in the eight target countries.

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 three instalments:

The payment will be performed in three instalments following the payment request through the official invoice from the side of the contracted expert:

1. A first instalment amounting to 1/3rd issued at the latest 5 working days after signature of the contract;
2. A second instalment amounting 1/3rd in November 2017;
3. A third instalment for the remaining 1/3rd issued after completion, delivery and approval by ETUCE of the final report as defined in above items.

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 (01/01/2017 – 31/12/2018) will be of maximum 30.000,00 € 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 possible participation in the advisory group meetings if needed, the round table meetings and the final project conference as project expert. These tasks will be 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: 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 two year 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 with qualitative data analysis in the field of social dialogue and policy 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 the European social dialogue
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 **6 February 2017** at the latest.

ETUCE

Subject: External expertise for the project ***“European Sectoral Social Partners in Education striving for sustainable influence on European education policy building through successful social dialogue. The ESSDE capacity building project III”***.

Bd. du Roi Albert II, 5, 9th floor

1210 Brussels

Belgium

secretariat@csee-etuce.org