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# ETUCE

## European Trade Union Committee for Education EI European Region

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

*Education for Social Change: The role of Education Trade Unions in addressing sustainable environmental development*

**Agreement number: VS/2020/0498**

**Subcontracting external expertise for conducting research activity**

Brussels, 8 February 2021  
Ref: SF/EE/10191



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### **1. Background**

The expert work to be carried out is part of the project “**Education for Social Change: The role of Education Trade Unions in addressing sustainable environmental development**” (supported by the European Commission under the Call VP/2020/002 Information and training measures for workers’ organisations, Budget heading 04.03.01.05).

ETUCE, the European Trade Union Committee for Education, represents 127 education trade unions across Europe and 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 trade 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.

ETUCE is also a European Trade Union Federation within the European Trade Union Confederation (ETUC).

Following the demand of ETUCE member organisations to support their work on sustainable development and its link to employment issues in the education sector,

ETUCE is implementing the project “Education for Social Change: The role of Education Trade Unions in addressing sustainable environmental development”. The aim of the project is to build the capacity of education trade unions to prepare their affiliates to address environmental questions and climate emergency for sustainable development in education and training through social dialogue and collective bargaining with the view to address the impact that climate emergency and environmental sustainability measures have on the education sector in the European region.

From the practical point of view, the project seeks to promote concrete trade union measures and practices in addressing the environmental issues and sustainable development in education and in addressing in social dialogue and collective bargaining at all levels the impact of environmental problems on education institutions and teachers, academics, and other education personnel. From the policy perspective, the project strives to foster the topic of education on sustainable environmental development in the work of the European Sectoral Social Dialogue in Education (ESSDE) and in implementing the European Green Deal and UN Sustainable Development Goals, as well as introduce it as one of the education priorities of the European Semester and the Country Specific Recommendations, with the view to ensure a coherent and robust integration of learning about sustainable approaches to the environment in education policies, national curricula, and teacher initial and continuous professional development for all educational levels;

## **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 to map-out through an education trade union online survey and participation in kick-off conference, the training workshops and the closing conference for the need of the following skills:

1. Experience with research on addressing environmental issues and sustainable development and its impact on workers, through social dialogue, in particular in the education sector (at European and national level);
2. Experience with research on education policy making and the work of social partners in education;
3. Proven experience with quantitative and qualitative analysis in the social field;
4. Understanding of education trade unions’ concerns as regards the challenges faced by the education sector and education workers in regard to the environment, climate emergency and sustainable development;

5. Experience in conducting surveys/interviews in the education sector in English and French (additional Russian language is strongly recommended and will be an asset).

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 to identify challenges faced by the education sector and education workers in regard to the environment, climate emergency and sustainable development, in different national and local contexts in Europe, and to study the role of education trade unions in addressing those challenges through social dialogue and collective bargaining;
2. Develop, with the input from the project advisory group, research questions to be addressed to ETUCE member organisations (through an online survey) on the impact of the climate emergency on education and on trade union policies, including the provision of equal access to quality education for everyone and integration of education on environmental issues, climate emergency and sustainable development;
3. Conduct the survey by using an online survey programme, considering 3 languages versions (English, French and Russian), and analyse the responses;
4. Gather a collection of successful, innovative and transferrable good practices measures and tools of education trade unions on supporting and building the capacity and knowledge of their affiliates to address environmental issues and sustainable development in education and notably in the social dialogue and collective bargaining, as well as on addressing the impact of environmental problems on education institutions and teachers, academics, and other education personnel;
5. Produce a research report in English gathering the survey results and data collected during the desk research to be presented during the closing conference in October 2022.
6. Contribute to the successful development of the project as a whole, by actively participating in six advisory group meetings;
7. Prepare background documents for the two training workshops based on desk research and online survey results;
8. Participate in the kick-off conference, the training workshops and the closing conference to present the research results and support the ETUCE team in the moderating with specific expertise.

#### **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 cancel 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 (01/12/2020 – 30/11/2022) 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 environmental issues and sustainable development 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 environmental issues and sustainable development and their impact on 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 **19 February 2021** the latest to:

ETUCE: [secretariat@csee-etuice.org](mailto:secretariat@csee-etuice.org)

Subject:

**Education for Social Change: The role of Education Trade Unions in addressing sustainable environmental development**

## **Annex.**

### **ETUCE project “Education for Social Change: The role of Education Trade Unions in addressing sustainable environmental development”**

#### **Description of the Action**

<b>Name of the activity</b>	<b>Time</b>
Meeting with research expert; Research experts start working on draft Survey questions and desk research resources	<b>23 February 2021</b>
1 <sup>st</sup> AG meeting (online)	<b>25 February 2021</b>
Kick-off Conference (online)	<b>22-23 April 2021</b>
2 <sup>nd</sup> AG meeting (online)	<b>6/7 May 2021</b>
Final version of online survey sent to ETUCE and then to translation in French and Russian	<b>14 May 2021</b>
Launch of the online survey and desk research; collection of replies	<b>6 September 2021</b>
Closing of online survey and analysis of the outcomes	<b>15 November 2021</b>
Submitting of the final Research report to ETUCE	<b>December 2021</b>
3 <sup>rd</sup> AG meeting (Brussels)	<b>January-February 2022</b>
1 <sup>st</sup> Training workshop (Rome)	<b>March - April 2022</b>
2 <sup>nd</sup> Training workshop (Copenhagen)	<b>May – June 2022</b>
4 <sup>th</sup> AG meeting (Copenhagen)	<b>May - June 2022</b>
Finalisation and translation of the research report and its executive summary	<b>September 2022</b>
Closing conference in Brussels	<b>November 2022</b>
5 <sup>th</sup> AG meeting (Brussels)	<b>November 2022</b>
Production and publication of the Practical guidelines for trade unions on addressing environmental issues and sustainable environmental development in the education sector	<b>December 2022</b>