



Education International
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ETUCE – European Trade Union Committee for Education
Education International - European Region

ETUCE Call for tenders to Subcontract external expertise to carry out research service for the EU-Project 101143483 — Your Turn 2

Brussels, 18 April 2024
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1. Background

The expert work to be carried out is part of the project *“Your Turn 2: Teachers for Trade Union Renewal”* (supported by the European Commission under the Call SOCPL-2023-INFO-WK (Support for social dialogue – information and training for workers), a two-year initiative ending in March 2026.

The European Trade Union Committee for Education (ETUCE) is a federation of 127 education trade unions in 51 countries 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 also a 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 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.

This project aims at supporting the collective capacity of trade unions to address changes in employment and work in the education sector, by increasing solidarity, improving coordination among ETUCE member organisations, and encouraging inclusive participation and actions intended to bring about change. To support this effort, ETUCE relies on the contribution of its internal Advisory Network on Trade Union Renewal, a group gathering education trade union representatives from 15 ETUCE member organisations mandated to support with their knowledge and expertise the activity of the European trade union federation in this area, to build even stronger and more democratic unions at national level.

In line with the priorities set by the ETUCE Extraordinary Conference 2021, the political and conceptual framework of this project is the ETUCE *“Action Plan on Organising and Renewal”* that presents a

strategy to ensure that all ETUCE member organisations are supported in their efforts to address within their structures issues related to the evolution of the labour market and its impact on job creation and retention in the education sector, with a particular emphasis on youth employment, namely focusing on the link between labour market fragmentation, terms of employment and education. Recent education reforms are exposing teachers and education personnel across Europe to similar challenges with respect to autonomy, accountability, decentralisation, working conditions and wages, employment trends and professional development opportunities – all leading to threats to attractiveness and the status of the teaching profession.

This ETUCE Action Plan is mainly meant to re-enforce efforts to strengthen the capacity of education trade unions to reach out to several target groups by information and training initiatives: their existing membership and/or those groups that are marginalised within the union, the un-organised teachers and other education personnel, also going beyond to the wider context of trade unions and of other people in the education community who share the vision, purpose and contribution of free, universal, public, high-quality education for the development of more equitable, fair and democratic societies.

Alongside with the outreach goals, the other crucial objective of the Action Plan is to maintain a permanent and active internal dialogue between ETUCE member organisations on how education trade unions can act to leverage education personnel's right to organise and to protect themselves, to share a common vision and to articulate their own demands on quality education. This requires building the individual capacity of members to act collectively and to engage within the union to achieve progress as well as to grow collectively as a European movement through networking and information sharing. However, the "Action Plan on Organising and Renewal" is not to be considered as a blueprint for trade union renewal. The national context and culture shape the way trade unions do things, and each union willing to engage in a process of renewal will follow its own path. The Action Plan is understood as a tool to support ETUCE member organisations' work at national as well as transnational level in their reflection and mutual learning process.

This ETUCE project then provides member organisations with support and tools to take the appropriate actions at national level for trade union renewal. During the project duration, two in-person training sessions and a final conference are organised to allow a platform for horizontal exchange of good practice among education trade unions, moving from the results of the collection of examples organised by ETUCE. These training workshops focus each on two of the four political priorities identified by the Action Plan: i.e. mobilising the under-represented; organising around ideas and campaigns; organising around work, community, and society; organising around professional issues.

An external expert contributes to the collection and analysis of inputs from members organisations, so to ensure the appropriate geographical balance and a comprehensive overview of the different challenges and solutions put into place by national trade unions. Both the training workshops and the research report including practical guidelines, resulting from the collection of members organisations' inputs, particularly focus on the countries represented in the ETUCE Advisory Network on Trade Union Renewal and on a set of selected European Member States: Spain, Germany, Netherlands, and Lithuania, with the cooperation of the relevant ETUCE national member organisations, respectively: FECCOO, GEW, AOb, and LŠMPS.

These activities aim at increasing knowledge and awareness among member organisations regarding the importance of measures for trade union renewal, but also contribute to creating political

momentum around the urgency of renewing trade unions' way of working and their approaches to specific issues, e.g. working conditions, digital and green transition, economic policy and investments, etc. The project concludes with a final conference, which gathers in person the responsible representatives for trade union renewal at national level, so to facilitate the mainstreaming of trade union renewal and strengthening the dedicated cross-border ETUCE Advisory Network on Trade Union Renewal. The practical outputs of this actions, to be presented at the final conference, are the creation of an online repository (in English, French, Russian) of good case examples and practices, and the publication of a research report including a set of practical guidelines based on the experience shared by members, which is to be translated in 3 languages (English, French, Russian).

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

2. Purpose of the contract

In the framework of the project, subcontracted research experts will provide an external and objective scientific perspective and high-level expertise on the issues at stake, such as labour market changes, recruitment and retention of workers in the education sector, with a focus on youth employment, and the capacity of trade unions to respond to these challenges and contribute to the good functioning of sectoral social dialogue. The experts will work on the preparation of the research survey and will contribute to the implementation of the training workshops and other mentioned project activities. In particular, the experts will be tasked with preparing a comprehensive online survey and follow-up interviews, complemented with a theoretical summary to identify the main challenges in the labour market within the education sector and the related actions by trade unions, with a focus on the relation between trade union renewal and collective bargaining in various education sub-sectors (e.g. primary, research, etc.). The expert will develop a mapping of good practices at national, regional and/or local level regarding the strategies and measures implemented by trade unions to respond to the latest trends in the labour market, according to their national traditions of social dialogue and collective bargaining and their internal structural organisation. This research work will result in the final research report including a set of practical guidelines and the online repository of good practices.

3. Service to be provided by the subcontractor

The Subcontractor in this project will have the following tasks:

- 1) Creating and managing the online survey (T2.1) by:
 - a) Elaborating the draft online survey;
 - b) Finalising and launching the online survey in cooperation with ETUCE Secretariat and based on the inputs of the AG members;
 - c) Collecting of the answers from ETUCE member organisations;
 - d) Setting up of the dataset for the analysis of the survey results;
 - e) Analysing and summarising the survey results;
 - f) Organising the results of the survey in an online repository;
 - g) Presenting the survey results to the project partners and AG members and discussing their

implementation into the project activities and final research report including practical guidelines;

- h) Conducting a desk research and literature overview;
 - i) Supporting and informing the project with research expertise throughout the project implementation (i.e., AG meetings, training workshops and final conference);
- 2) Preparing the final research report including a set of practical guidelines (T2.2) by:
- a) Discussing the objective and the structure of the final practical guidelines with ETUCE, in consultation with the Advisory Group;
 - b) Presenting the desk research and literature overview;
 - c) Drafting practical guidelines in cooperation with ETUCE based on the findings of the online repository;
 - d) Presenting the draft final research report and practical guidelines to the project leaders and the project Advisory Group;
 - e) Finalising the final research report and practical guidelines in consultation with the project Advisory Group and ETUCE Secretariat;
 - f) Drafting a 2/3-page executive summary with theoretical framing of the issue and the main insights from the final practical guidelines.

4. Expertise, experiences, and skills required

ETUCE requires the Subcontractor, providing 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 direct contacts with education trade unions and participation in kick-off conference, the social dialogue seminars, and the closing conference, to have the following skills:

- Research expertise on addressing labour market changes and trade union renewal issues, with at least some knowledge on job attractiveness, recruitment, and retention – 20%;
- Experience with research on education policy making and/or on social partners in education and industrial relations – 20%;
- Proven experience with quantitative and qualitative analysis in the social field – 20%;
- Understanding education social partners need on addressing trade union renewal in the education sector – 10%;
- Ability to meet budget allowance – 10%;
- Management experience in a project team, preferably, for EU-funded projects – 10%;
- Ability to meet deadlines and ensure participation in the project activities – 10%.

5. Time schedule and reporting

The Subcontractor contributes to the successful development of the project by actively participating at various project events in Spain (February 2025), Germany (September 2025), Lithuania (January 2026).

The research kick-off starts after the signature of the contract by the two parties and the first meeting with the ETUCE project coordination team. Considering inputs from the Advisory Group (September -

October 2024), the Subcontractor is expected to deliver the online repository of good practices and the final research report by January 2026.

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

6. 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 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 (01/04/2024 – 31/03/2026) will be of maximum 30.000,00 € 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 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, advisory group meetings, 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.

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.

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 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 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 Subcontractor 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.

7. Award criteria

The contract will be awarded to the tenderer whose offer ensures the best value for money and no conflict of interest, considering the following 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. 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

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

8. Content and presentation of the bids

1.1 *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 item 2 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 (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.

1.2 *Presentation of the bids*

Replies must be presented electronically via email **by 30 April 2024 (midnight, CET)** at the latest to:

ETUCE-CSEE

Subject: External Research expertise for EU Project 101143483 — Your Turn 2

Bd. Bischoffsheim 15, 6th floor

1000 Brussels, Belgium

E-Mail: secretariat@csee-etuqe.org

9. Selection of the bids

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