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Tender Specifications for subcontracting external expertise for the project

Social Partners Promoting Decent Workplaces in the Education Sector for a Healthier Working Life,

Agreement number: VP/2014/001

Subcontracting external expertise for Research study at local level amongst education staff (teachers, school leaders) to identify practical and concrete ways to prevent and combat work-related stress in education, focusing in particular on joint social partner initiatives including four case studies

Brussels, 8 January 2015

Ref: MR/sf /9759

1. Background

The expert work to be carried out is part of the project *Social Partners Promoting Decent Workplaces in the Education Sector for a Healthier Working Life* (supported by the European Commission under the Call VP/2014/001 Industrial Relations and Social Dialogue, Budget heading 04.03.03.08), a 2 year initiative ending 30/11/2016.

ETUCE is the biggest European umbrella organisation of teacher trade unions in 48 countries. 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 several projects regarding the health and safety of teachers, focusing in particular on the prevention of teachers' work-related stress and violence against teachers. The most recent project dealt with Teacher trade unions in solidarity for

healthy and safe workplaces in the economic crisis. More information on the ETUCE projects is available at: www.edu-osh.org.

2. Purpose

ETUCE requires a contractor with an external and objective scientific perspective and expertise on the issue at stake, to carry out the research study at local level amongst education staff (teachers, school leaders) including four case studies in the target countries (Romania, Germany, Finland and Belgium); This task requires the following skills:

1. Experience with research on occupational and social issues, such as psychosocial hazards (at European and national level)
2. Experience in conducting surveys/interviews in the education sector in English and French.
3. Understanding of the concerns of education staff in general, of teacher unions and employers in education as regards the national transposition and implementation of the European Directive 89/391/EEC and the EU Strategic Framework on Health and Safety at Work 2014-2020 (COM(2014) 332 final)
4. Understanding of social partner joint initiatives at national and European level.

The contractor contributes 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, questions for the short online survey among ETUCE and EFEE member organisations, national teacher unions and organisations of education employers
2. Conduct the online survey within the period of 16 March 2015 to 12 April 2015 and the subsequent analysis of the replies.
3. Develop, with the input from the project advisory group, interview questions for the case studies at local level, amongst education staff (teachers, school leaders) to identify practical and concrete ways to prevent and combat work-related stress in education, focusing in particular on joint social partner initiatives
4. Scientifically consult the organisation and accomplishment of the case studies in Germany, Romania, Finland and Belgium
5. Produce a research report gathering the case study results in English (50 pages)
6. Contribute to the successful development of the project as a whole, by actively participating in five advisory group meetings
7. Participate in the training seminars and in the final conference of the project to present the main research results

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 two instalments:

1. A first instalment amounting to 50% will be issued after signature of the contract, during the initial phase of the action.
2. A second instalment of the remaining fees will be issued after completion, delivery and approval by ETUCE of the final research report as defined in above items.

Payments will be done by bank transfers to a bank account for which the external expert will communicate the IBAN and BIC.

If the contractor does not fulfil his/her tasks and duties, the contract may be cancelled.

The contract may not be transferred without the party's 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 (01/12/2014 – 30/11/2016) will be of maximum 25.000,00 € **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 transfers to and from airport (by public transportation, taxis not reimbursed) for his/her participation in the advisory group meetings, training seminars and the final project conference. 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 and/or the European Commission.

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 and the European Commission.

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 quantitative data analysis in the field of psychosocial hazards 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 psychosocial hazards in the education sector
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 2015 the latest:

ETUCE

Subject: **External expertise for Social Partners Promoting Decent Workplaces in the Education Sector**

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