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## ETUCE Call for tender to

### Subcontract external expertise to carry out research service for the EU Project 101145637 – InclEdu4AllNeeds

Brussels, 10 April 2024  
LF/ee/10388

#### 1. Background and objective of the project

The expert work to be carried out is part of the project “**Inclusive education for all needs: European Sectoral Social Partners in Education promoting inclusion of persons with special needs in education**” (supported by the European Commission under the Call SOCPL-2023-SOC-DIALOG (Support for social dialogue), a two-year initiative ending in March 2026.

The European Trade Union Committee for Education (ETUCE) represents 127 Education Trade Unions and 11 million teachers in 51 countries of Europe. ETUCE is a Social Partner in education at the EU level and a European Trade Union Federation within ETUC, the European Trade Union Confederation. ETUCE is the European Region of Education International, the global federation of education trade unions.

ETUCE is a sectoral 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., safe and healthy workplace, adequate working time and workload, social protection, and 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, a forum where representatives of national education unions and education employers in Europe meet regularly to discuss and commit to relevant education/employment issues.

The outbreak of the COVID-19 pandemic in 2020 and linked to it the shift to online teaching, as well as the war in Ukraine and linked to it the migration, energy and socio-economic crises in Europe, inflicted severe consequences especially for those students who are already disadvantaged. Following the commitment of European Social Partners in Education to enhancing the provision of the quality and inclusive education which realizes the full potential of every student and pays special attention to learners at risk of exclusion and underachievement, this project aims to identify and promote

successful joint approaches of social partners in ensuring the full inclusion of persons with special needs in education systems and education policies (focusing on education personnel and leadership of education institutions), as well as to evaluate the current policies and practices, resulting in a concrete set of proposals and recommendations for national member organisations, employers in education, education authorities and governments. Through this project, ETUCE and EFEE also aim at consolidating a solid basis for the continuation of the dialogue process both at national and European level to empower social dialogue to adapt to the changing world of work, ensuring that transitions to a digital, climate neutral economy and new forms of employment, leave no one behind. Furthermore, the project aspires to support education trade unions and education employer organisations across Europe to become more pro-active in addressing the issue of the inclusion of persons with special needs in education systems with an intersectional approach and against the backdrop of the consequences of COVID-19, in their national social dialogue structures and within the European Semester consultation practices at national level.

Main project activities include the study of the state-of-art including desk research, online survey and focus group discussions in selected countries, school visits, two training workshops, and a final conference. Project's main policy outcome is Practical guidelines on how to promote effective inclusion of persons with special needs in the education system and education policies through joint social partner initiatives.

More information on the ETUCE projects is available at: [www.csee-etu.org](http://www.csee-etu.org).

## 2. Legal basis

The contractual agreement is based upon and regulated by the European Commission's rules, provisions and requirements as set out in the project grant agreement n. 101145637 ("InclEdu4AllNeeds" project) and the applicable Belgian law.

## 3. Purpose of the contract

ETUCE requires a subcontractor (research expert) to provide an external and objective scientific perspective and expertise on the issues at stake in the "InclEdu4AllNeeds" project, such as the inclusion of persons with special needs in the education system and education policies and the functioning of sectoral social dialogue in matters related to the education sector. The research expert will work on the preparation of a research report and contribute to the implementation of the project activities, including the project advisory group meetings, the study visits, the training seminars, and the final Conference.

## 4. Service to be provided by the subcontractor

In particular, the Subcontractor in this project is required to:

- Carry out **desk research and a literature review** to identify and evaluate the existing legislation, special programmes and measures undertaken at national, regional, local or institutional level as regards the inclusion of persons with special needs in the education system and education policies, as well as assess the impact of the EU policies on inclusion on

the national educational and employment policies, identifying challenges (e.g. special needs teachers shortage, additional support needed) and potential solutions.

- Develop, with the input from the project advisory group, research questions to be addressed to ETUCE and EFEE member organisations (**online survey**) to collect their views on the state-of-art of inclusion of persons with special needs in their national education systems, as well as to identify the joint approaches, practices and strategies of social partners in education to ensuring the full inclusion of persons with special needs in the education system and education and employment policies, through addressing the relevant professional needs of school leaders, teachers and other education personnel, challenges linked to working and learning conditions (including digital and sustainable education), initial and continuous professional development, recruitment and retention, and other areas.
- Based on the desk research and online survey findings, **prepare and conduct focus group discussions** in the framework of the country study visits to Germany and Romania.
- Prepare the **research report** based on the findings of the online survey among ETUCE and EFEE member organisations, desk research and two country study visits, enriching it with outcomes of the 2 project training seminars; as well as prepare a 3-pages executive summary and 2 factsheets.
- Participate in the project advisory group meetings to regularly update ongoing research work.
- Work in close coordination with the ETUCE project's team throughout the project.

## 5. Expertise, experiences and skills required

ETUCE requires the Subcontractor to have the following requirements:

- Experience with research on addressing the inclusion of persons with disabilities in education and training systems (at European and national level).
- Experience with research on education policy making and the work of social partners in education.
- Proven experience with quantitative and qualitative analysis in the social field.
- Understanding of education social partners' concerns as regards the challenges and needs of the education sector across Europe regarding the inclusion of persons with disabilities.
- Ability to meet budget allowance.
- Management experience in a project team, preferably, for EU-funded projects.
- Ability to meet deadlines.
- Availability to attend meetings.

## 6. Time schedule and reporting

The launch of the production starts after the signature of the contract by the two parties and the first meeting with the ETUCE project coordination team (June 2024).

Considering regular input from the Advisory Group, the Subcontractor is expected to deliver a final research report on an ongoing basis and no later than December 2025.

The rest working calendar will be agreed on the occasion of the first meeting between the ETUCE and the subcontractor.

## 7. 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

The total amount that the expert will receive in compensation for the abovementioned tasks during the project lifetime will be a **maximum € 30,000.00 (VAT and all taxes included)**.

The Subcontractor is 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 the participation of 1 person in the preparatory meetings, advisory group meetings, study visits, training seminars and the final project conference as project research 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, in order 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 with regard to 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.

## 8. Award and selection 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 selection criteria:

- Evidence track record of research and/or experience on addressing the inclusion of persons with disabilities in education and training systems (at European and national level) – 20%.

- Experience with research on education policymaking and/or on social partners in education and industrial relations in English– 20%.
- Proven experience with quantitative and qualitative analysis in the social field – 10%.
- Understanding of education social partners’ concerns as regards the challenges and needs of the education sector across Europe regarding the inclusion of persons with disabilities – 10%.
- Ability to meet budget allowance – 10%.
- Research experience of working in English in a project team, preferably for EU-funded projects – 10%.
- Ability to meet deadlines and ensure participation in the project activities – 10%.
- Availability during the two-year project for the requested tasks – 10%.

## 9. Content and presentation of the bids

### 9.1 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 3 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 that the tenderer meets the requirements and is able to provide the services on the terms stipulated.

### 9.2 Presentation of the bids

Replies must be presented electronically via email **by 6 May 2024 (midnight, CET)** at the latest to:

**ETUCE**

Subject: External Research expertise EU Project 101145637 – InclEdu4AllNeeds

Bischoffsheimlaan 15,

1000 Brussels, Belgium

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

## 10. 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.