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**Tender Specifications for subcontracting external expertise for
*Teachers' work-related stress: European-wide Survey – Assessment, Comparison
and Evaluation of the Impact of Psychosocial Factors on Teachers at their
Workplace in the EU*, proposed project submitted under the Call VP/2010/001
Industrial Relations and Social Dialogue, Budget heading 04.03.03.01**

Brussels, 30 November 2010

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1. Background

The expert work to be carried out is part of the project *Teachers' work-related stress: European-wide Survey – Assessment, Comparison and Evaluation of the Impact of Psychosocial Factors on Teachers at their Workplace in the EU* (supported by the European Commission under the Call VP/2010/001 Industrial Relations and Social Dialogue, Budget heading 04.03.03.01).

The ETUCE is the European umbrella organisation of teacher trade unions in Europe. It has a membership of 135 national organisations in Europe and represents around 12.8 million teachers. The ETUCE is recognised as the industry federation of the ETUC within the education sector and as such is the representative voice of teacher unions in relation to the EU. ETUCE has organised numerous seminars, round tables and conferences for 35 years and is well experienced in managing projects. As a European industry Federation of ETUC, the ETUCE takes part in the confederation's activities as a social partner in the EU. Moreover, it has recently achieved the establishment of the European Sectoral Social Dialogue Committee for Education.

The ETUCE has carried out several projects in the field of work-related stress concentrating on the establishment and implementation of the ETUCE Action Plan on Work-Related Stress (see annex) to support its member organisations to continue implementing the European Framework Agreement on Work-Related-Stress in the education sector. This European Framework Agreement, which was signed by ETUC-UNICE/UEAPME-CEEP in 2004, founds on the legislative grounds of the European Directive 89/391/EC on the introduction of measures to encourage improvements in the safety and health of workers at work. The main targets identified in these projects were to continue working on risk assessment, including Work-Related-Stress (WRS) in collective agreements and the procedures and strategies that teacher unions should follow when dealing with and preventing WRS at school level.

In the latest project the ETUCE member organisations developed practical guidelines and exchanged good practice examples of establishing risk assessment systems at national and school level which include psychosocial hazards, such as work-related stress. The outcome of this project showed that in order to ensure the implementation of the European Framework Agreement on Work-Related Stress in the education sector and for the ETUCE member organisations to continue their work on implementing the ETUCE Action Plan, concrete up-to-date statistics and information on teachers' work-related stress are essential. On these grounds ETUCE intends to launch a European-wide research project to collect concrete information and facts on work-related stress amongst teachers with the aim to gather accurate and comprehensive data for the ETUCE and its member organisations to use in their ongoing and future work on this Health and Safety topic. In addition, these survey results will serve as a basis for the discussion on Health and Safety issues within the newly established European Sectoral Social Dialogue Committee in Education where work-related stress is included in the joint agenda.

The project lifetime is 12 months and will be carried out under the auspices of the European Commission, DG Employment, Social Affairs and Equal Opportunities. The ETUCE is in charge of the project and financial management.

The actual research should preferably be conducted on the basis of scientifically validated methods to assess psychosocial factors at work, such as the Copenhagen Psychosocial Questionnaire (COPSOQ).

Through an on-line survey ETUCE intends for the first time to collect data at grassroot level from teachers in 500 schools in all EU/EFTA countries. The innovative study approach will focus on three steps: measuring and documenting the

impact of teachers' psychosocial hazards at their workplace, defining priorities for action and evaluation to facilitate the selection of improvement strategies for continued risk assessment at school.

The overall aim of this survey is to provide reliable and useful statistics that will support national teacher unions in their national Social Dialogue structures when dealing with and setting up concrete and sustainable strategies on Health and Safety in schools, in particular as regards preventing and tackling WRS and including psychosocial hazards in risk assessment in schools. This will give further support to the ETUCE member unions to become pro-active and include psychosocial hazards and WRS in the social dialogue process at national level and in collective agreements in their respective country. At European level the collected data will help the ETUCE to further develop its policy paper on WRS (ETUCE Action Plan) and support its work on the issue within the European Sectoral Social Dialogue Committee in Education.

2. Purpose of the Contract

The purpose of this contract is to provide external expertise to the proposed one year project on teachers' work-related stress, which seeks to survey all countries in the EU/EFTA, so as to gather concrete and detailed data in a European-wide study on how work-related stress affects at grassroot level teachers at their workplace and how teachers perceive psychosocial hazards and compare and evaluate the results European-wide. The contractor conducts the research, develops concrete instruments (online-questionnaire, online-platform) especially designed for the purpose of this study in 500 schools in the EU and analyses the survey results. In addition, the contractor compiles and sends a survey report for each participating school in English. The data collected will be compared with external reference values (national/international mean teachers) and a final report on the research outcome will be compiled in English. The survey results will be presented by the researcher at a conference.

He/She 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; its composition is described in 3.2 Methodology. The contractor will also meet twice the ETUCE policy coordinator in

charge of this project during the project lifetime to discuss the survey outline and the survey results.

3. Tasks to be performed by the Contractor

3.1. Description of tasks

The external expert in this project will have the following tasks:

1. Develop and conduct the online-survey on the impact of Work-Related Stress on teachers in the EU/EFTA countries to be conducted in 500 schools
2. Conduct a pre-test online-survey prior to the online-survey and correct any mistakes or technical flaws before the actual launch of the survey
3. Provide and programme the online-platform (questionnaires and information texts in 21 languages (DE-FR-EL-NL-DK-CZ-EST-FI-BG-HU-EN-IT-LT-LV-PL-PT-RO-SK-SL-ES-SV), connection of survey to database, data protection concept, individual direct feedback for every participant)
4. Scientifically consult the organisation and accomplishment of the survey
5. Contribute to the successful development of the project as a whole, by actively participating in the advisory group meetings
6. Produce individual survey reports for each school participating in the survey in English to be sent to each participating school
7. Produce the research report gathering the survey results in English
8. Participate in the project conference to present the main survey results
9. Any other minor tasks determined by the advisory group in the interest of the project.

3.2. Guidance and indication on tasks execution and methodology

The ETUCE policy coordinator in charge of the project will meet the external expert to confirm the contract outlines, the schedule of project events and the reporting procedures for the project activities. In a second meeting with the ETUCE Secretariat, the preliminary survey results will be discussed in preparation of the project conference together with the draft outline of the research report. To accomplish the tasks listed in 3.1, the external expert will work under the guidance of the ETUCE Secretariat and the project advisory group. He/She will be in contact with the ETUCE Secretariat throughout the project.

Methodology

- a) The project will be lead by an Advisory Group which will guide the project implementation and meet at regular intervals throughout the project implementation period. Next to a member of the ETUCE staff, Susan Flocken, the Advisory Group will be composed of experts from four teacher unions as well as one member of the European Federation of Education Employers (EFEE). All members of the Advisory Group have already proven their expertise and commitment to the work of ETUCE in previous projects.¹ The advisory group members will support the study not only with their expertise and knowledge on teachers' work-related stress but most importantly help to identify the schools in all EU/EFTA countries targeted in this study and establish contacts with these schools and their respective teachers to reply to the questionnaire.
- b) The actual research will be conducted by the research institute from which the ETUCE will have received the most appropriate reply to its tender, preferably on the basis of the Copenhagen Psychosocial Questionnaire (COPSOQ). With such an on-line survey ETUCE intends for the first time to collect data at grassroots level from teachers in 500 schools in all EU/EFTA countries. The study will focus on three steps: measuring and documenting the impact of teachers' psychosocial hazards at their workplace, defining priorities for action and evaluation to facilitate the selection of improvement strategies for continued risk assessment at school.

4. Expertise required

The contractor would be expected to demonstrate:

1. Experience with research on occupational and social issues, such as psychosocial hazards (at European and national level)
2. Experience in performing research based on the Copenhagen Psychosocial Questionnaire (COPSOQ) method
3. Experience in conducting online-based surveys in the education sector
4. Understanding of teachers and teacher unions' concerns as regards the national transposition and implementation of the European Framework Directive 89/391/EC.
5. Providing an external and objective perspective and expertise on the issue at stake

¹ EFEE is the European-level employers' organisation in the education sector and partner of ETUCE in the European Social Dialogue Committee in education.

6. Sound knowledge of the English language

5. Time schedule and reporting

The project is scheduled for 12 months. The beginning of the contract period is foreseen for December 2010 and is subject to the grant agreement between the ETUCE and the European Commission, DG Employment, Social Affairs and Equal Opportunities. Interim results will be discussed at the advisory group meetings. A pre-test phase of the online-survey is foreseen one to two months prior to the online-survey to find and correct any flaws or technical problems that might occur. The online-survey is scheduled for three weeks plus an additional “Reminder-week” and taking place during the main school year so as to avoid lack of participation of teaching staff during the general holiday season. The individual school reports in English are due within one to two months after the closure of the online-platform and will be presented to each school. The preliminary draft of the final study report is to be presented to the ETUCE Secretariat and the advisory group one month prior to the project conference in autumn 2011. The final study report including input from the project conference must be delivered to the ETUCE Secretariat at the end of the project.

6. 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 1st month of the action.
2. A second instalment of the remaining fees will be issued after completion, delivery and approval by ETUCE of the final study 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 tasks and duties, the contract may be cancelled.
The contract may not be transferred without the party's written agreement.

7. Price

The total maximum price is Euro 80.000, including website costs. This price includes all taxes as e.g. VAT.

This total price is subject to the final budget for external expertise approved by the European Commission.

8. Selection criteria

The present tender is published on the home page of the ETUCE website and other relevant websites. In addition it is sent to candidates whom ETUCE has identified as complying with the main criteria to successfully conduct the requested tasks. A first selection will be based 1) on acceptance of the price and 2) on the availability during the one-year project for the requested tasks (item 3). The external expert will be selected according to the standards of selection that have been developed by the 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.

9. 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

10. Content and presentation of the bids

10.1 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.

10.2 Presentation of the bids

Replies have to be presented on 15 December 2010 the latest:

ETUCE

Subject: ***External expertise for European survey on teachers' work-related stress***

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