

Call for Tenders: European training for young Trade Union leaders Programme Assessment

Contracting Organisation

European Trade Union Institute (ETUI)
Education Department
Boulevard du Roi Albert II n°5, box 4
B-1210 Brussels
Belgium
(AISBL 0418.812.841)

Launch date

25 October 2021

Reference

ETUI 2021-23

ETUI background

ETUI, The European Trade Union Institute is the independent research and training centre of the European Trade Union Confederation (ETUC) which itself affiliates European trade unions into a single European umbrella organisation. The ETUI places its expertise in the service of workers' interests at European level and of the strengthening of the social dimension of the European Union.

One of the two of ETUI's departments – the education department – is responsible for training courses for the national confederations and European federations. The strong strategic and educational activities from ETUI's Education department are face to face. The target groups are very diverse.

All the training activities are for the trade union movement and have a European dimension. In this way, they help to strengthen the social dimension of the European Union. (See <http://www.etui.org/Training>).

Context of this call and purposes

For more than a decade, the ETUI Education Department has worked to empower future TU leaders from the national confederations and European federations. The European training for young TU leaders programme aims to prepare young trade union leaders for the highest future responsibilities in the trade union movement for an activity with a European dimension. In this way, they help to strengthen the social dimension of the European Union.

Each year ETUI, in partnership with national Organizations, invites up to 25 participants under 40 to attend a 9 months training including 3 weeks of face-to-face course and 2 intermediate periods working at distance. The participants are young trade union officers who have been elected or appointed to posts at the regional or national level, had some prior trade union training at regional/sectoral/ national level, and were faced with the challenge of transnational trade union activity.

Importantly, participants can be from member organisations located in any of the Countries where the European Trade Union Confederation (ETUC) has its affiliates (see: www.etuc.org), which mainly include EU Member States and other Candidate Countries.

The working language used during this training programme is mainly English, although for some editions additional languages were offered.

The programme was assessed 7 years ago, with a systematic analytical framework and comprehensive data collection activities. This has resulted in some significant improvements in the quality of the programme, one of the most remarkable ones is the certification accredited, since the course edition 2015/16, by the UK NOCN through a partnership with the TUC and the Edinburgh College.

Each of ETUI's accredited courses is based on specific "learning outcomes" – statements which make clear what the course will enable the participants to do – and "assessment criteria" explaining what the learner has to do to demonstrate that the learning outcomes have been met.

The main aims of this Programme are:

- 1. Develop the capacity to integrate the European and national dimension/perspective into the trade union work, by**
 - improving the knowledge of economic and social realities in Europe;
 - developing knowledge of, and the ability to assess the main European policies and the national trade unions' realities and positions;
- 2. Develop the capacity to work in a multicultural environment, by**
 - understanding the advantages and specific aspects of cultural diversity within Europe;
 - building, coordinating, and leading multicultural groups;
 - developing participants' ability to cooperate at the European level;
- 3. Develop the capacity to communicate on the trade union topics, by**
 - using a shared trade union terminology;
 - conducting and participate in debates;
 - using online tools for collaborative work via distance;
 - improving drafting skills for written message/ presentation/ report/ synthesis;
- 4. Analyse complex situations and design trade union strategies**
 - developing their observation skills;
 - developing the capacity to analyse different trade union realities;
 - setting objectives and propose solutions;

- drafting trade union action plans;
5. **Contribute to the development of the European trade union identity by enhancing leadership skills.**
- adopting a leadership style;
 - enhancing critical thinking;
 - developing a project management approach.

Purposes:

The overall objective of the assessment is to evaluate the relevance, impact, added value of the programme to train young European trade union leaders from ETUI Education throughout the last six years.

The specific objectives are to evaluate:

- the degree to which the participants saw their responsibilities increase in the organisations, at the European, National or Regional level.
- the number of former participants now leading projects in their organizations at the European, national or regional levels.
- the relevance of the contents and the efficacy and efficiency of learning of the programmes (the knowledge acquired was applied in their workplaces).
- the impact and added value for the affiliated organisations, as well as other key stakeholders, and by extension, to contribute to the development of Social Europe and the European social dialogue.
- the impact and added value of the certification accredited by the UK NOCN through a partnership with the TUC and the Edinburgh College.

The subject of evaluation

Training courses for “European training for young Trade Union leaders” and their effects. As per tender specifications evaluation will only consider courses carried out in the past five editions of the programme.

This includes:

Edition 2015/16 (October 2015 to June 2016)

Edition 2016/17 (October 2016 to June 2017)

Edition 2017/18 (October 2017 to June 2018)

Edition 2018/19 (October 2018 to June 2019)

Edition 2019/20 (October 2019 to February 2021, due to the pandemic)

An approximate number of persons who have been trained: 120. Only participants who managed to complete the Programme will be considered for this Assessment. On the contrary, participants who dropped out will not be taken into account.

An approximate number of trainers and experts: 25. Trainers, assessor, and experts' opinions will be key to evaluate the relevance of the contents and the efficacy and efficiency of the learning programme.

Evaluation criteria:

The evaluation should provide an analytical approach and evaluate the relevance, efficacy, efficiency, impact, added value, and coherence of the programme.

The methodology for data collection is to be determined by the evaluator with ETUI approval.

The evaluator will review and analyse existing project documents provided by the ETUI.

The evaluation should be conducted mainly through secondary data review, focus group discussions, key informant interviews, and interviews with a broad range of project stakeholders, including trainers, experts, assessors, and participants.

The following deliverables are expected:

- The evaluator will prepare an evaluation report describing the evaluation process and presenting conclusions and recommendations for the project. Moreover, the following annexes have to be included:
Terms of Reference of the evaluation; names of the evaluator(s); methodology applied for the study (phases, methods of data collection, sampling etc.); logical Framework matrices (original and improved/updated); list of persons/organizations consulted; literature and documentation consulted; any other technical annexes (e.g. statistical analyses).
- A verbal presentation and explanation of the contents of the evaluation report at least two weeks after the report submission.

Estimated total value of tender – excluding VAT

25.000 EUR-

Selection criteria

The contract will be awarded to the tenderer whose tender best corresponds to the required expertise and requested tasks described in this tender. ETUI Education will award the bid on a best price/quality ratio.

The quality of the bids will be assessed by considering:

- Signed declaration of honour (Annex II);
- Bidder's expertise in assessing training programmes;
- Quality of previous work or services rendered.

Languages in which the tenders can be submitted

English

Submission of tenders

To apply please submit:

- CV
- A 3-page memo with proposed methodology for the evaluation
- An example of evaluation report recently completed in English.

Tenders and their supporting documents can be submitted by electronic mail to Sylviane Mathy (smathy@etui.org) and Paula Mejía González (pmejiagonzalez@etui.org)

Inspection

The tenderer agrees to any inspections and/or audits that the European Commission, as part of any project, might wish to carry out pursuant to the financial regulations in force at the Commission, subject to the same conditions that apply to the direct beneficiaries of the relevant financial agreement with the Commission.

Invoicing

The contractor(s) shall accept responsibility for any legal obligations entailed by the contract and is(/are) required to submit in his/her(/their) country of origin the requisite tax statements relating to the services supplied.

Value added tax, where applicable, shall be shown separately on all invoices as a net extra charge. All other taxes, levies and expenses shall be borne by the contractor and shall not be included in the relevant invoices.

Jurisdiction

The Brussels courts shall have sole jurisdiction for any litigation relating to this contract, which shall be governed by Belgian law.

Type of contract and duration

Duration: 3 months (The ETUI plans to conclude a framework contract with the successful bidder during the period from 15 December 2021 to 15 March 2022).

Calendar requirements

- This call for tenders is issued on 25 October 2021.
- Deadline for submission of bids: 29 November 2021.
- Selection process and award decision 7 December 2021.
- Start of contract(s): 15 December 2021, for the duration of 3 months.

Contacts

For any questions related to the contents of this tender please contact Paula Mejía or Sylviane Mathy directly – (pmejiagonzalez@etui.org) or (smathy@etui.org).

Annex 1: ETUI terms and conditions

Basic Contract Information Section

1. Definition & Interpretations

In these conditions:

1.1. "The Authority" means the ETUI

1.2. "The Contract" means the agreement concluded between the ETUI and the Contractor including these Conditions, the specification as set out in the Statement of Requirements, invitation to tender, the tender document, plans, drawings and other documents which are relevant to the Contract. In the case of any discrepancy among these documents these Conditions shall prevail.

1.3. "The Contractor" means the firm who undertakes to render the Services for the ETUI as provided for by the Contract.

1.4. "The Contract Period" means the period of duration of the Contract.

1.5. "Representative of the Authority" in any provision of the Contract means the person duly authorised by the Authority to act for the purposes of the provision.

1.6. The masculine includes the feminine and the singular includes the plural and vice versa.

1.7. Any notice or other communication which is to be given by either party to the other can be transmitted by electronic mail confirmed by a mail receipt or a written letter.

1.8. All communication between the parties, letters, documentation, specifications, reports etc. shall be in the English.

2. Entire Agreement

2.1. The Contract constitutes the entire agreement between the parties relating to the subject matter of the contract. The Contract supersedes all prior negotiations, representations and undertakings, whether written or oral, except that this Condition shall not exclude liability in respect of any fraudulent misrepresentation. Any changes, amendments and supplements to the Contract must be made in writing and signed by the parties.

3. Duration of the Contract

3.1. The Services/Goods shall be provided for a period as stated in the Specification.

Extensions to the Contract will be subject to satisfactory performance and require the written consent of the ETUI. ETUI shall give reasonable notice of its decision concerning contract extensions.

4. Governing Law

4.1. Only the courts of Brussels (Chambre francophone) shall have jurisdiction to rule on any dispute arising in connection with the present contract. The present contract shall be governed by Belgian law.

5. Payment

5.1. ETUI is an AISBL (0418.812.841), not liable to VAT. Our prices include Value Added Tax and all other taxes. VAT, where applicable, shall be shown separately on all invoices.

5.2. Payments will be made within thirty days following the events.

6. Assignment & Sub-Contracting

6.1. The Contractor shall not assign or sub-contract any portion of the Contract without the prior written consent of ETUI.

7. Intellectual Property Rights

7.1. It shall be a condition of the Contract that, except to the extent that materials may incorporate designs furnished by ETUI, the Contractor will not infringe any patent, trade mark, registered design, copyright or other right in the nature of intellectual property of any third party and he shall indemnify the Authority against all actions, suits, claims, demands, losses, charges, costs and expenses which the Authority may suffer or incur as a result of, or in connection with, any breach of this Condition.

7.2. All intellectual property rights in any specifications, instructions or other material:

a) Furnished to or made available to the Contractor by the ETUI shall remain the property of the ETUI.

b) Prepared by or for the Contractor for use, or intended use, in relation to the performance of this Contract shall belong to the ETUI.

7.3. At the termination of the Contract the Contractor shall immediately return to the

Authority all materials, work or records held, including any back up media.

8. GDPR

The candidate / tenderer is required to comply with the requirements of the General Data Protection Regulation (GDPR), ensuring the processing, data security and data protection of data subjects when personal data are involved in the data protection in the framework of a future contract or intention to conclude a contract.

Further information on how the ETUI handles personal data and contact details is available on the privacy notice on the ETUI website at www.etui.org.

Annex II: Declaration of honour – to be included in all submissions

I HEREBY CERTIFY, AS CANDIDATE/LEGAL REPRESENTATIVE OF THE CANDIDATE, THAT THE CANDIDATE:

- is not bankrupt or being wound up, is not having his/her affairs administered by the courts, has not entered into an arrangement with creditors, has not suspended business activities, is not the subject of proceedings concerning those matters or is not in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- has not been convicted of an offence concerning his/her professional conduct by a judgment which has the force of res judicata;
- is not guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- has fulfilled his/her obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which he/she is established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- has not been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
- is not currently subject to an administrative penalty referred to in Article 96(1) of the Financial Regulation;

Signature Date:

THAT THE CANDIDATE /legal representative of the candidate:

- is not subject to any conflict of interest;
- that the candidate will inform the contracting authority, without delay, of any situation constituting a conflict of interest or which could give rise to a conflict of interest;

Signature Date:

To the best of my knowledge, all information provided is true and accurate.

Signature Date:

The ETUI reserves the right to check the information provided. Together with this form, duly signed, the candidate undertakes to send any additional document which the ETUI considers necessary to perform its checks.

By signing this form, the undersigned acknowledges that he/she accepts controls/audits from the European Commission under the same conditions as the ETUI.

Signature Date: