

# Call for tenders for subcontracting expertise – Digitalisation and work: the role of information, consultation and board-level representation in the light of opportunities and risks - focus on Crowdfunding

This is a call for a subcontractor to provide expertise as part of the implementation of the ETUC project on “Digitalisation and work: the role of information, consultation and board-level representation in the light of opportunities and risks” with a specific focus on Crowdfunding.

In order to ensure a large visibility of this call for tender, the ETUC will publish the tender specifications on its website, on Friday 16 December 2016, and keep it online for 28 calendar days (deadline for submission of bids: Friday 13 January 2017).

## 1. Summary of the project and description of the objective

Digitalisation currently has become one of the most important catchwords in the debate about structural changes and modernisation of society and economy (both in the national and European context) and in particular in the world of work. The new challenge has taken the form of a *digital revolution*, the fourth industrial revolution, industry 4.0, smart services, crowd-sourcing platforms looking for crowdworkers.

A particular point is *crowdfunding*:

If crowdfunding is not regulated, a return to 19<sup>th</sup> century working conditions might well happen: This growing part of the workforce is outside national labour law and is not covered by fundamental social rights. The extension of digital precarious work to crowdworkers working from home or other workplaces (telework, etc.) without any employment contract is alarming. Crowdworkers get no holiday pay, no sick pay, are not covered by social security.

Crowdfunding must be considered a new form of outsourcing of work through internet platforms and the dynamic increase of digital microjobbers, although still a peripheral phenomenon, necessitates a framework at European level. Amongst the inherent risks are the de-limitation of work (“always on”) and the de-limitation of companies with crowdworkers executing tasks from remote locations.

- The whole world and Europe in particular is currently facing a gigantic transformation in the world of work.
- **One major challenge is related the emergence of new forms of mobile or digital work such as *crowdfunding*, new forms of semi-self-employment and other forms of work and employment that often are both highly flexible and highly precarious. Questions, tasks and requirements in this context are:** What impact will it have on full-time and part-time employment, taking into account

gender aspects, what impact on work-life balance, maternity and parental leave, sabbaticals, working time policy, income distribution, in particular income inequality, and last but not least on workers' representation and organising? How can the power asymmetry between platforms/employers and crowdworkers be shaped? These questions provide a useful intellectual benchmark for thinking about the future Digital Europe. Some stakeholders demand a strong regulation of monopolistic digital platforms, and propose that big data must be open and algorithms fair.

- The classical picture of an enterprise as an entity limited locally and functionally is put into question by companies outsourcing service tasks not via another classical company but through internet platforms addressed directly to the "crowd".
- It is necessary to create a new legal framework for crowdworkers. Crowdfunding is part of a major transformation in the world of work. Crowdfunding designates a phenomenon where companies outsource work or services through digital platforms to a big public ("crowd") without offering a working contract but through a simple service contract. More and more companies have recourse to outsourcing via service contracts, even in core business activities such as R&D, logistics, production, etc. The phenomena of "isolated workers" or "fake self-employed" are on the increase.

## 2. Methodology

The subcontractor will be asked to produce a research study on crowdworking platforms and in particular draft recommendations for an adequate policy framework at European level.

For this research study, working methods will consist of a period of desk research followed by interviews with actors who are involved in setting up or working for online platforms. These interviews will focus on mapping out the risks and opportunities. This study will be discussed at some of the European cluster seminars and used by the project advisory committee to produce recommendations. Both the study and the recommendations will be presented at a European level final conference.

## 3. Tasks to be performed by the subcontractor

The external expert will be in charge of the following tasks:

- The external expert will be in charge of producing a study on crowdworking, platform work as well as other new emerging forms of mobile digital work focussing not only in a better understanding of major trends and patterns as well as drivers but also addressing key issues such as working conditions, social conditions and if possible information, consultation and board-level representation of workers. Here in particular "crowdworking" in its various facets will be studied and analysed in regard to both quantitative as well as qualitative aspects. Apart analysing the phenomenon, the objective of the study will be to elaborate options and possibilities (also on the basis of good practice examples) for a regulation at EU level.
- Liaise closely with the project steering group;
- Present and discuss the research study at conferences and cluster seminars foreseen in the project.

## 4. Expertise, experience and skills required

Expertise required:

- Academic Expertise on the role of online platforms and in particular work related platforms/crowdworking;
- Knowledge of European level policies on online platforms and collaborative economy;
- Experience in working on European level projects;
- Experience in working with social partners at both European and national level;

Skills required:

- Proven ability to carry out in-depth research on EU issues and understanding links between European and national level
- Proven research skills, including identifying stakeholders and conducting interviews
- High proficiency in English: ability to draft documents and make presentations in English
- Ability to work within specified deadlines and to respect budgetary limits
- Ability to travel for cluster seminars in Europe during the project timeframe.

## 5. Time schedule and reporting

The subcontractor will be asked to produce the first draft of the research study by **mid 2017**, in time to discuss at the series of cluster seminars and the final draft by end 2017 in time to allow the formulation of recommendations by the project advisory committee for a final conference in 2018.

### *Provisional timetable*

The project will start in January 2017 and will finish on 31 November 2018.

The provisional timetable foresees the following activities and dates:

<b>Date</b>	<b>Activity</b>	<b>Place</b>
Month 1 (Spring 2016)	Launch workshop	Brussels
Month 3 (Spring 2017)	Cluster seminar (Nordic)	Copenhagen
Month 6 (Summer 2017)	Cluster seminar (Southern)	Madrid or Barcelona
Month 10 (Autumn/Winter 17)	Cluster seminar (Eastern)	Tallinn
Month 15 (Spring 2018)	Cluster seminar (Western)	Berlin
Month 19 (Summer 2018)	Final conference	Brussels
Month 22	“publication launch” event	Brussels

The subcontractor will liaise closely to the steering group. The subcontractor will attend 2 cluster seminars and the final conference as well as the publication launch event, which will all be held **between January 2017 and Autumn 2018.**

## 6. Payment

The total maximum budget available for the fees of the subcontractor is as follows:

<b>Contract with ETUC</b>	
<b>Main activities and Meetings</b>	
<ul style="list-style-type: none"> <li>▪ Desk research</li> <li>▪ Drafting scientific research study</li> <li>▪ Participating in project meetings</li> </ul>	
<b>Total budget for the Expertise</b>	<b>9.000 €</b>
	<b>9.000 € (all taxes included)</b>

The subcontractor will be remunerated in various instalments (advance and final payment). This amount does not include the travel and subsistence costs incurred for attending steering group meetings and conducting the interviews for research study. These will be covered by ETUC on the basis of EU rules & thresholds.

## 7. Selection criteria

The selection criteria are:

- Verifiable expertise, experience and skills, as required and described in parts 3 and 4 of this call;
- Proven track record of ensuring the quality of written materials produced, both in terms of content and format (i.e. previous publications), in the relevant subjects specified in this call for tenders;
- Price not exceeding the amount stated above;
- Previous research/work undertaken in the field of workers participation related to digitalisation will be considered a plus.

## 8. Form, structure and content of the tender

Tenders must be written in either English. They must be signed by the tenderer or his duly authorised representative and be perfectly legible so that there can be no doubt as to words and figures. Tenders must be clear and concise and assembled in a coherent fashion.

Since tenderers will be judged on the content of their written bids, they must make it clear that they are able to meet the requirements of the specifications.

All tenders must include at least two sections:

- i) Technical proposal

The technical proposal must provide all the information needed for the purpose of awarding the contract, including:

- Specific information covering the technical and professional capacity, as required, in particular:
  - Description of relevant professional experience with emphasis on the specific fields covered by the invitation to tender;
  - Detailed curriculum vitae of key coordinator and/or possible other team members;
  - A selection of the main works and/or articles published by all the experts involved, in relation to the relevant subjects specified in this tender.
- Specific information concerning the proposed methodology for delivering the tasks listed in part 3.

ii) Financial proposal

Prices of the financial proposal must be quoted in euros, including if the sub-contractor is based in a country which is not in the euro-area. As far as the tenderers of those countries are concerned, they cannot change the amount of the bid because of the evolution of the exchange rate. The tenderers choose the exchange rate and assume all risks or opportunities relating to the rate fluctuation.

Prices must be fixed amounts and shall not include travel expenses and daily allowances for the 15 country visits and steering meeting attendance (which will be covered by ETUC on the basis of EU rules & thresholds).

The maximum amount available for this contract is EUR 9,000 (all taxes included).

Prices shall be fixed and not subject to revision during the performance of the contract.

## 9. Award Criteria

The contract will be awarded to the tender offering the best value for money, taking into account the specific objectives, requirements and selection criteria of the tender. The principles of transparency and equal treatment will be respected with a view to avoiding any conflicts of interest.

## 10. Content and selection of the bids

**This call for tenders will be published on the ETUC website on Friday 16 December 2016. Offers must be sent within 28 days of the date of publication, by Friday 13 January 2016.** Offers must be sent to ETUC, in both formats: electronic (by e-mail to [amartin@etuc.org](mailto:amartin@etuc.org)) and as a paper copy (see contact details below).

Concerning the paper copy, to ensure confidentiality, bidders must submit their offer in a double envelope. Both envelopes must be sealed and the inside envelope shall not only bear the name of the department for which it is intended (see below), but also the words "Tender Worker participation and Crowdwork project – not to be opened by the Mail Department" (Appel d'offres – à ne pas ouvrir par

le service du courrier). If self-adhesive envelopes are used, they must be sealed with adhesive tape crossed by the signature of the sender.

A committee will be formed comprising of representatives of the ETUC. One or more members of this committee will initial the documents, confirming the date and time of each bid. The committee members will sign the report on the bids received, which will list the admissible bids and provide reasons for rejecting bids owing to their failure to comply with the stipulations of the tendering process.

This committee will also evaluate the tenders that have been deemed admissible. An evaluation report and classification of participation requests will be drawn up, dated and signed by all the members of the evaluation committee and kept for future reference.

This report will include:

1. The name and address of the contracting authority, the purpose and value of the contract or framework contract;
2. The names of any excluded candidates and the reasons for their rejection;
3. The names of candidates selected for consideration and the justification for their selection;
4. The names of candidates put forward and justification of their choice in terms of the selection or award criteria.

The contracting authorities will then make their decision.

Candidates must send their bid electronically – to the following e-mail address: [amartin@etuc.org](mailto:amartin@etuc.org) – as well as submitting a paper copy of their bid, either delivered by hand or by registered mail or special courier service to:

<p><b>ETUC</b></p> <p>Peter Scherrer</p> <p>Deputy General Secretary</p> <p>International Trade Union House</p> <p>Boulevard du Roi Albert II, 5</p> <p>B – 1210 Brussels</p> <p>BELGIUM</p>
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For bids sent by registered mail, the postmark will serve as proof of the date of dispatch.