

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

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".

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 objective of the project is to enhance the role of information, consultation and board-level representation at European, national, regional, company level, in ensuring a just transition towards fair digital work.

Digitalisation in Europe must be based on good – digital – work and the transition must be anticipated and managed in close cooperation with trade unions, *European Works Councils and workers' representatives* in general. Good work in industry 4.0 or smart services needs to be based on a new social contract with democracy at the workplace.

Tools which can be used to anticipate and manage change (such as Works Councils, EWCs, WBLR) are becoming more important, in particular information in advance of digital transformations and digital restructuring processes, consultation on the process and participation rights as well as forward looking training in digital skills. The impact of digital transformation on these representation bodies needs to be addressed and discussed to adapt and re-shape them where necessary.

- The whole world and Europe in particular is currently facing a gigantic transformation in the world of work. Many aspects and facets of the *ongoing digitalisation process* are not yet understood or evident. Which problems are linked to this process? What solutions will be advocated? What does all this mean for democracy at the workplace, and in particular information, consultation and board-level representation? What impact on work organisation? What opportunities to influence company decision making in the digital era through information,

consultation and board-level representation in a context of protracted high unemployment destroying skills?

- First an in depth analysis of the *transformation of “traditional” forms of work through digitisation* is needed, in industries as well as services. Many interesting question need answers on questions such as: What are the new challenges linked to this transformation, in particular for workers, but also for workers’ representatives? Is the impact different for different categories of workers, for women, for youth, for older workers – is there a gender gap as in the ICT sector and a generational gap, and how can it be overcome?

2. Methodology

The subcontractor will be asked to produce a research study based on interviews on the role of information, consultation (works councils, EWCs) and in particular board-level representation at European, national, regional, company level.

For this research study, working methods will consist of a period of desk research followed by interviews (by phone or, whenever possible, face-to-face) with actors who are involved in the information, consultation and board-level representation at European, national, regional, company level. These interviews will focus on mapping out the risks and opportunities of digitisation, and will involve members of Works Councils, European Works Councils, company board-rooms. This study will be discussed at 4 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.

The subcontractor will attend steering group meetings regularly in Brussels to allow the steering group to monitor and contribute to the work of the subcontractor, and the subcontractor will be expected to contribute the cluster seminars and conferences foreseen in the project. The steering group will consist of members from the ETUC, as well as their affiliated sectoral members industriAll and UNI-Europa.

3. Tasks to be performed by the subcontractor

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

- Desk research on good and bad practice examples of worker involvement and digitalisation, and production of a study/report on the basis of a survey including questionnaire and interviews with ETUC members and experts.
- Assisting the ETUC secretariat in animating workshops and a conference as well as drafting proposals (and the review of) / providing input to the workshop and the conference.
- Producing a leaflet of policy recommendations.

Project step 1: Taking stock of experiences of trade unions and workers interest representation

- Questionnaire based survey amongst ETUC affiliates

- Identification of a representative number of cases of good practices of trade union involvement at the level of specific sectors, at regional and national level as well as in individual transnational companies (EWCs) that illustrate innovative approaches of practices responding to the key challenges and questions resulting from digitalisation as highlighted above.

Project step 2: A final conference, after a kick-off workshop in Brussels and a series of regional workshops with clusters of countries in order to exchange experiences and information of good practices and develop further cornerstones for digital work

- Series of 5 workshops addressing key themes (from the topics mentioned above, e.g. restructuring in the context of digitalisation; strengthening trade union involvement in digital agendas, EWCs and digitalisation, etc.)
- After a first workshop that will be organised in Brussels to design and launch the survey, a major activity of the project will consist of 4 regional workshop organised in cooperation with national affiliates in a specific country and attended by affiliates from a limited number of countries (mixing different EU regions, but around clusters of 7-8 Member States)
- The final conference is organised to present major results of the survey/study and to present and discuss suggestions on a sustainable European trade union agenda for digitalisation of work with other stakeholders

Evaluation and dissemination of results

- Elaboration of a report summarizing results from project steps 1 and 2, i.e. the survey amongst key stakeholders such as WCs, EWCs, Boardroom members, and exchange on practical experiences with ETUC member organisations at national level and the gathering of good and innovative practices (report)
- Providing a leaflet of policy recommendations to support the ETUC involvement in EU level debates, dialogue and consultation (leaflet).

4. Expertise, experience and skills required

Expertise required:

- Expertise on the role of information, consultation (works councils, EWCs) and in particular board-level representation at European, national, regional, company level in the shaping of digitisation in companies and offices;
- Knowledge of European level policies on digitalisation;
- Experience in working on European level projects;
- Experience in working with social partners at both European and national level;
- Network of contacts with national-level and European trade union organisations.

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:

Date	Activity	Place
Month 1 (Spring 2017)	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 and report to the steering group. The subcontractor will attend meetings of the steering/advisory group, 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:

Contract with ETUC	
Main activities and Meetings	
<ul style="list-style-type: none"> ▪ Questionnaire & interviews ▪ Drafting research study and leaflet ▪ Participating in the steering group meetings and in the project conferences 	
Total budget for the Expertise	27.000 €
	27.000 € (all taxes included)

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 27.000 (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 2017. Offers must be sent to ETUC, in both formats: electronic (by e-mail to 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 digitalisation 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 – as well as submitting a paper copy of their bid, either delivered by hand or by registered mail or special courier service to:

ETUC

Peter Scherrer

Deputy General Secretary

International Trade Union House

Boulevard du Roi Albert II, 5

B – 1210 Brussels

BELGIUM

For bids sent by registered mail, the postmark will serve as proof of the date of dispatch.