

Digital Transformation and Social Dialogue in Urban Public Transport in Europe



Call for tenders

Scientific expertise on: Digital transformation and social dialogue in urban public transport in Europe

Dear Sir / Madam,

If you wish to participate in this invitation to tender, you are asked to submit your bid by **15 March 2019**. You may do this

- a) by registered letter (including private messenger service), to be posted no later than **15 March 2019** to the following postal address:

EVA Europäische Akademie für umweltorientierten Verkehr gGmbH
Reinhardtstraße 23
10117 Berlin

- b) **and** by e-mail by **12:00 hrs** on **15 March 2019** to Almut.spittel@eva-akademie.de

One copy of the bid is sufficient. Bids must be signed by the tenderer or his duly authorized representative and clearly legible to eliminate any possible doubt as to wording or figures. Tenderers will be informed of the outcome of their bid.

Candidates not intending to submit a bid are asked to notify us before the deadline at Almut.spittel@eva-akademie.de.

Tender specifications for subcontracting external expertise

Part I – The contract

1. Title of the contract

Scientific expertise on: **Digital transformation and social dialogue in urban public transport in Europe**

2. Background and context of the contract

Digital transformation takes place in more and more areas of society and in the world of work. Technological change highly affects urban public transport with its large share of technical resources. The decision to introduce new technologies might be driven by the objective to increase performance, to meet customers' demands, to retain or increase quality service or it might be driven for cost saving reasons. The political guidelines for the European Union, presented by Jean-Claude Juncker in 2014, already promote digital transformation: "Enhancing the use of digital technologies and online services should become a horizontal policy, covering all sectors of the economy and of the public sector."¹ Technological innovations concern not only the introduction of new devices and facilities, but also the service organisation and involved and/or future personnel. Furthermore, new business concepts like for example integrated mobility platforms based on digital developments change the expectations, requirements and possibilities of customers, companies, employees and public authorities. Examples are transport as a component of the "Smart City" concept or "Mobility as a Service (MaaS)". Data processing can be used also internally for failure prediction for asset maintenance or demand analysis for network and line planning. But data collection and processing can also be used for employee performance supervision.

In public transport, automation and digitalisation have an impact on jobs and working conditions. New technologies can create labour, replace labour, intensify labour, change labour, facilitate labour and re-organise labour. Most jobs will be affected by the digitalisation process. The use of artificial intelligence intervenes in the familiar working processes. New service providers appear. "Working life is being radically transformed by the combined effect of technological progress, globalisation and the growth of the services sector... The workforce has to cope with an increased pace of change for acquiring new skills, adjusting to new business models or adapting to shifting consumer preferences."²

The social partners agree that the current developments due to the digital transformation will have both facilitating and disruptive effects on future urban mobility. They agree that it is of utmost importance to contribute to shaping this digital future. These processes need to be managed and planned. UITP and ETF will adapt their social dialogue to anticipate, prepare and manage digital transformation. "A well-functioning social dialogue is key for achieving social fairness while ensuring

¹ Juncker, Jean-Claude (2014): A New Start for Europe: My Agenda for Jobs, Growth, Fairness and Democratic Change. Political Guidelines for the next European Commission.

² European Commission (2017): Reflection Paper on the Social Dimension of Europe. P. 17.

economic performance”.³ This action is part of the work program of the European sectoral social dialogue for urban public transport.

At the company level social partners should engage in a proactive way to accompany the transformation process which has already begun. An analysis of the impact on workers and working conditions in urban public transport is still missing but of high importance. The social partners presume that different areas of urban public transport are affected by the transformation process.

- Operations: network and line planning, digital control systems and signaling, automated vehicles, drivers assistance systems (control systems, communication systems), automated garages;
- Maintenance: predictive maintenance/sensor-based interventions, centralized versus distributed locations, innovative storage concepts, 3D printing, applications for augmented reality;
- HR management & new work organisation: staff dispatching, mobile workplaces, virtual teams, cloud solutions for home offices, web-based knowledge and information systems, social media;
- Customer services: mobility platforms, mobility services, travel and ticket information, passenger information, ticketing, payments, sales & customer relation, customer reporting, video analytics.

As far as fully automated road vehicles are concerned, the situation is far from being clear, as in addition to technology, the systems for safety assurance, liability and market regulation will have to be adapted. Furthermore, the use of data, data protection and in particular of employee’s data is an issue as well.

At sector level, the new IT technologies are also deeply transforming the organisation of mobility in urban areas. New business models might change the management, operation and financing of public transport. The implementation of digital technology is different in all European countries. A new concept is MaaS (Mobility as a Service) with which the customer can use various transport options via a single mobility service. The question for the future of mobility in the cities arises, who is determining the mobility concept, the conditions including for the personnel and managing mobility.

All the mentioned developments and examples are having and will have an impact on work and on the people doing the work. “Jobs are likely to altered as a consequence of automation, digitalisation and artificial intelligence”.⁴ On the one hand, employment, job descriptions and working conditions will change. On the other hand, individuals will be required to adapt and update their skills to change. The social partners of the urban public transport sector identified the following areas of examination:

- Employment: changes in work practices and employment relationships, job security, job mobility, flexible jobs and flexible work organisation, crowd-working and crowd-sourcing, impact on women’s employment in UPT and gender equality;
- Working conditions: physical, psychological and environmental requirements, health and safety aspects etc. directly affected by the changes in the technology of production, working time concepts, personal data protection;

³ European Commission (2017): Draft Joint Employment Report from the Commission and the Council accompanying the Communication from the Commission on the Annual Growth Survey 2018. P. 9.

⁴ The European Economic and Social Committee (2018): Opinion. EU concepts for transition management in a digitalised world of work – key input for an EU White Paper on the future of work. P. 3.

- Match of tasks and skills: job profiles, occupations, skills, qualifications, training requirements;
- Social dialogue: shaping technological change, involving staff in change processes, co-determination rights.

The key to good work, innovation and competitiveness in public transport companies is a forward-looking company policy based on good working conditions and a well-trained workforce. The European Commission's Annual Growth Survey 2018 demands the support of people to build the skills needed in the labour market. "For example, while 90% of all jobs require digital skills, 44% of Europeans are estimated to be lacking them".⁵ Companies can contribute to the match of tasks and skills of their workforce. Eurofound comments "While the tasks and occupational profiles of employees around Europe are subject to change, this does not necessarily have to lead to a complete loss of whole professions and job cuts. Qualifying workers for future jobs is of paramount importance in this context."⁶

The social partners should be involved in the transformation process, facilitating a joint approach for new benchmarks for skills and qualifications, securing high service quality and good working conditions. The European social dialogue will support the joint activities of social partners. "EESC highlights in its study the importance of informing and consulting workers' representatives in advance and the need for collective bargaining to accompany the changes generated by these technologies."⁷

Gender equality and equal opportunities in urban public transport is still an issue. Especially in the digital transformation process diversity must be a priority. "Globally, figures indicate that women's participation in the ICT and digital sector are not improving significantly."⁸ The social partners will identify specific aspects of working conditions for women related to digital transformation in the sector.

With these activities the project meets the priority of the call to contribute to addressing the overarching EU employment and social policy challenges. They will adapt social dialogue to the digitalisation of the economy and society and will anticipate, prepare and manage change and restructuring for the benefit of the quality of work. The project will build and reinforce the capacity of national sectoral social partners to engage in national social dialogue and to participate in and contribute to European social dialogue.

3. Specific objectives

The overall aim of the project is to anticipate, prepare, and manage changes in the sector and in the workplace in order to shape the digital transformation. To reach this goal, the social partners will obtain with a first step more information regarding digital developments in customer services,

⁵ European Commission (2017): Communication from the Commission to the European Parliament, the Council, the European Central Bank, the European Economic and Social Committee, the Committee of the Regions and the European Investment Bank. Annual Growth Survey 2018. P. 9.

⁶ Eurofound (2017): Addressing digital and technological change through social dialogue. <https://www.eurofound.europa.eu/publications/report/2017/eu-member-states/addressing-digital-and-technological-change-through-social-dialogue>. 8.8.2018.

⁷ The European Economic and Social Committee (2018). P. 4.

⁸ European Commission (2018): Women in the Digital Age. Executive summary. P. 3.

maintenance, operations and HR management and work organisation in the sector. With a second step they will analyse the impacts on employment, working conditions, changing tasks and skills requirements and social dialogue. The key objectives include a common social partner strategy for smooth change, joint recommendations and the role of collective bargaining for a smooth transition⁹. The project partners intend to achieve the following specific goals:

- Information about the relevant developments of the digital transformation in the sector in the areas of customer services, operations, maintenance and HR management and work organisation;
- Obtain an overview of the expected impact of digital transformation on work, especially on employment, working conditions, tasks and skills and social dialogue;
- Develop a common strategy towards policy decision makers;
- Draft joint recommendations, developing principles regarding the introduction of new technologies and social dialogue.

With this project the European Social Partners in the urban public transport sector have the ambition to support the implementation of the European Pillar of Social Rights by contributing to shaping the future of work in the public transport sector in the spirit of a fairer and more inclusive European Union.

4. Purpose of the contract

The project will be supported by an external expert, a university or a consultant from a research institute with knowledge on technological transformation, the effects on work and industrial relations. The social partners need information and have to learn about the challenges for the sector. Therefore external expertise and support is necessary. With a profound analysis and advice the social partners will be able to draft their conclusions. The expert should know about the process of current and expected technological developments, preferably in the transport sector. The focus of the work shall be the anticipation of transformation effects on work. The external expert will organise and conduct the interviews, contribute to the Workshops and Conference and will write the workshop reports and the guide. The working language of the external expertise shall be English.

5. Tasks of the external expert

5.1 Description of tasks

The expert shall give the social partners profound guidance through the topic of technological transformation and the impact on work and social dialogue. The specific tasks of the expert are mentioned under the following activities. Following activities are foreseen:

⁹ The specification of the transformation process will have to be discussed during the project. ETF prefers the term „just transition“.

1) Desk research on digital developments and transition management

Months: 2-3

Duration: 2 months

Responsible: External expert, support from the steering committee

Language: English

Tasks of the expert:

- Analysis and evaluation of the current technological developments in urban public transport from
 - Scientific publications
 - Publications of the EU institutions
 - Publications of the social partners
- Identification of cities and companies with practical examples of digital transformation, which will be interviewed
- Analysis of the impact of digital transformation on work

Method: desk and empirical research

2) Interviews with stakeholders and social partners

Months: 4-6

Duration: 3 months

Responsible: external expert, support from the steering committee

Language: English

Tasks of the expert:

- Development of interview guidelines in consultation with the steering committee
- Conducting 10-15 interviews with management and trade union representatives for
 - The collection and description of experiences, good practice examples, implemented policies and concrete strategies to shape digital transformation
 - Examples of change management policies, collective bargaining agreements, training schemes, measures on EU level, measures of other sectors
- Presentation of the results including the analysis of the impact on work

Method: telephone and personal interviews. It is expected that most of the interviews can be conducted by the expert without interpretation due to the experts' language skills. Interpretation can be provided from additional project funds in a few cases.

3) Participation in the Project Steering Committee Meetings 2-5

Place, Date, Duration:

- SCM 1: Brussels, month 2, 1 day
- SCM 2: Brussels, month 5, 1 day
- SCM 3: Paris, month 8, 1 day (following Workshop 2)

- SCM 4: Barcelona, month 11, 1 day (following Workshop 4)
- SCM 5: Brussels, month 15, 1 day

Participants: 12 persons, 4 UITP members, 4 ETF members, 1 UITP, 1 ETF, 1 EVA, 1 expert

Language: English, French, German

Programme

- Discussion of the project progress
- Selection of case studies and speakers for the Workshops
- Evaluation of the outcome of the Workshops
- Evaluation of the research work
- Discussion of a common strategy
- Discussion and draft joint recommendations
- Discussion of the practical guide

Tasks of the expert:

- Participation in Steering Committee Meeting 1. **This meeting will take place shortly after the deadline of the call. The date can be requested from the tendering office.**
- Participation in the Steering Committee Meetings 2-5
- Contribution with research results
- Advice from the expert's point of view for the work of the social partners. These can be from experience, research results, good practice examples etc. and give guidance for a social partner strategy. It is important that the social partners receive support to ensure a smooth/just transition.

4) Workshops 1-4

Tasks of the expert:

- Recommendation of practical examples, which will be presented during the workshops
- Participation in 4 Workshops
- Contribution with research results and practical examples
- Summary of the presentations and discussion for the report

4. 1 Workshop 1: Digital transformation in operations and its impact on work

Month: 6

Place: Budapest

Duration: 2 days

Participants: 30 persons (10 steering committee members UITP and ETF, 8 UITP members, 8 ETF members, 1 EVA, 1 expert, 2 speakers)

Languages: English, French, German, Hungarian, 1 additional language

Topic: Digital transformation in operations and its impact on work

Program:

- Presentation of digital innovations in operations, e.g.
 - Network and line planning
 - Digital control systems and signaling
 - Automated vehicles
 - Drivers assistance systems (control systems, communication systems)
 - Automated garages
- Discussion of the impact on employment, working conditions, tasks and skills
- Measures of gender equality and equal opportunities
- Consequences for social dialogue
- Identification of items for the common strategy and the joint recommendations
- On the spot visit of case examples

4. 2 Workshop 2: Digital transformation in maintenance and its impact on work

Month: 8

Place: Paris

Duration: 2 days

Participants: 30 persons (10 steering committee members UITP and ETF, 8 UITP members, 8 ETF members, 1 EVA, 1 expert, 2 speakers)

Languages: English, French, German, 2 additional languages

Topic: Digital transformation in maintenance and its impact on work

Program:

- Presentation of digital maintenance solutions, e.g.
 - Predictive maintenance, sensor-based interventions
 - Remote diagnosis
 - Centralized versus distributed locations
 - Innovative storage concepts
 - 3D printing
 - Applications for augmented reality
 - Digital devices and applications in maintenance
- Discussion of the impact on employment, working conditions, tasks and skills, data protection
- Measures of gender equality and equal opportunities
- Consequences for social dialogue
- Identification of items for the common strategy and the joint recommendations
- On the spot visit of case examples

4. 3 Workshop 3: Digital transformation in HR management and work organisation

Month: 10

Place: Barcelona

Duration: 2 days

Participants: 30 persons (10 steering committee members UITP and ETF, 8 UITP members, 8 ETF members, 1 EVA, 1 expert, 2 speakers)

Languages: English, French, German, Italian, 1 additional language

Topic: Digital transformation in HR management and work organisation

Program:

- Presentation of digital innovations in HR management and work organisation, e.g.
 - Staff dispatching
 - Mobile workplaces
 - Virtual teams
 - Cloud solutions for home offices
 - Web-based knowledge and information systems
 - Social media.
- Discussion of the impact on employment, working conditions, tasks and skills
- Measures of gender equality and equal opportunities
- Consequences for social dialogue
- Identification of items for the common strategy and the joint recommendations
- On the spot visit of case examples

4.4 Workshop 4: Digital transformation in customer services and its impact on work

Month: 11

Place: Vienna

Duration: 2 days

Participants: 30 persons (10 steering committee members UITP and ETF, 8 UITP members, 8 ETF members, 1 EVA, 1 expert, 2 speakers)

Languages: English, French, German, 2 additional languages

Topic: Digital transformation in customer services and its impact on work

Program:

- Presentation of digital customer services concepts, e.g.
 - Integrated mobility platforms
 - Mobility services
 - Travel, ticket and passenger information
 - Ticketing and payments
 - Sales and customer relation
 - Video analytics
- Discussion of the impact on employment, working conditions, tasks and skills
- Measures of gender equality and equal opportunities
- Consequences for social dialogue
- Identification of items for the common strategy and the joint recommendations
- On the spot visit of case examples

5) Participation and contribution to Dissemination Conference

Month: 15

Place: Brussels

Duration: 1 day

Participants: 100 persons (UITP, ETF, speakers, guests of the European institutions, EVA)

Language: English, French, German, 2 additional languages

Programme

- Presentation of the project results
- Presentation of the main developments
- Presentation of the impact on work
- Presentation and discussion of the common strategy
- Presentation and discussion of the joint recommendations

Tasks of the expert:

- Participation in the Conference
- Presentation of the research results

6) Drafting and production of the guide “Digital Transformation and Social Dialogue in Urban Public Transport”

Month: 12-17

Duration: 6 months

Responsible: external expert, support from ETF, EVA, UITP

Content

- Description of the relevant developments of the digital transformation in the sector in the areas of customer services, operations, maintenance and HR management and work organisation
- Overview of the expected impact of digital transformation on work, especially on employment, working conditions, tasks and skills and social dialogue
- Common strategy of the European social partners
- Joint recommendations of the European social partners

The report will be written in English and translated into German, French and 2 additional languages.

Tasks of the expert:

- Drafting the report in English
- Description of the relevant developments of the digital transformation in the sector in the areas of customer services, operations, maintenance and HR management and work organisation from research work and the results of the 4 Workshops
- Overview of the expected impact of digital transformation on work, especially on employment, working conditions, tasks and skills and social dialogue as the result of the research work and the discussion in the 4 Workshops

Advice from the expert’s point of view for the work of the social partners to give guidance for a social partner strategy. It is important that the social partners receive support to ensure a smooth/just transition.

5.2 Guidance and indication on tasks execution and methodology

The planned content and the tasks of the external expert are described in the paragraph above. The duration of the contract will end with the end of the project duration. The work has to be done in consultation with the contracting body. Drafts shall be consulted with the Steering Committee via the contact persons of the project promoter. The final versions shall be agreed within the Steering Committee and finally accepted by the contact person of the project promoter. The agreement on the texts shall be in a written form.

6. Expertise required

The external independent institution, that will conduct the tasks for this project, shall have knowledge of technological transformation and its impact on work and industrial relation.

The tenderer shall prove his/her expertise giving some examples of his/her work. The contract will be awarded to organizations that fulfil the following criteria verifiably:

- Organisations with scientific experience in the fields of European and national employment topics, especially in the context of technological transformation;
- Organisations with personnel with relevant European language skills;
- Organisations experienced in realizing empirical studies and interviews in different countries with different stakeholders;
- Organisations which are familiar with industrial relations and social dialogue;
- Organisations with experience in consulting and supporting international projects with diverse partners;
- Organisations with the capacity to manage the tasks within the budget maximum amount.

The language for all papers, presentations and reports is English in native speaking quality. The tenderer must prove this capacity.

7. Time Schedule and reporting

Delivery of the final products shall be latest on the date of the final Conference.

Working plan and time schedule of the project

Month	Activity	Place	Participants	Duration
Month 1	Call for tenders		ETF, UITP, EVA	1 month
Month 2	Steering Committee Meeting 1	Brussels	11 Steering committee members (5 UITP, 5 ETF), 1 EVA	1 day

Months 2-3	Desk research, interview guidelines		Expert	
Month 4-6	Conducting interviews to collect experiences and good practice examples		Expert	
Month 5	Steering Committee Meeting 2	Brussels	12 Steering committee members (5 UITP, 5 ETF), 1 EVA, 1 expert	1 day
Month 6	Workshop 1	Budapest	30 participants: 10 steering committee members, 16 national social partners reps, 1 EVA, 1 expert, 2 speakers	2 days
Month 8	Workshop 2 + SCM 3	Paris	30 participants: 10 steering committee members, 16 national social partners reps, 1 EVA, 1 expert, 2 speakers	2 days
Month 8	Steering Committee Meeting 3, following WS 2	Paris	12 Steering committee members (5 UITP, 5 ETF), 1 EVA, 1 expert	1 day
Month 10	Workshop 3	Barcelona	30 participants: 10 steering committee members, 16 national social partners reps, 1 EVA, 1 expert, 2 speakers	2 days
Month 11	Workshop 4 + SCM 4	Vienna	30 participants: 10 steering committee members, 16 national social partners reps, 1 EVA, 1 expert, 2 speakers	2 days
Month 11	Steering Committee Meeting 4, following Workshop 4	Vienna	12 Steering committee members (5 UITP, 5 ETF), 1 EVA, 1 expert	1 day
Months 12-15	Drafting the guide "Digital Transformation and Social Dialogue in Urban Public Transport"		Expert	
Month 15	Dissemination Conference	Brussels	100 participants	1 day

Month 15	Steering Committee Meeting 5	Brussels	12 Steering committee members (5 UITP, 5 ETF), 1 EVA, 1 expert	1 day
Months 16-17	Translation and publication practical guide			
Month 18	Report to the Commission		ETF	

8. Payments and standard contract

A contract will be concluded and the final payment will be done after acceptance of the products. Interim payments will be done after acceptance of the work packages. Delivery of the final products shall be the latest on the date of the Final Conference.

9. Price

The maximum costs will be **60,000.00 EUR** (sixty thousand) including VAT lump sum. This price represents the complete costs for the working packages listed under 4. "Tasks of the external expert". Under no circumstances these costs can be increased. Travel and accommodation will be covered for 1 person per event from additional project funds.

Part II – The tendering procedure

1. Selection procedure:

The tenderer shall prove his expertise giving some examples of his work.

The maximum costs total **60,000.00 EUR (sixty thousand)** including VAT lump sum.

<u>TASKS</u>	<u>Unit costs</u>	<u>NUMBER OF WORKING DAYS</u>	<u>TOTAL</u>
Secondary research, Analysis and evaluation of the current technological developments in urban public transport, draft report, Consultation with project promoter and steering committee			
Preparation of the target-group specific interview guidelines Initiation of target groups contacts Conduct of oral interviews in person and by phone in the local language, follow-up, Evaluation of oral interviews and creating a presentation of results			
Identification of relevant developments and its impact on work Preparation for presentation			
Contribution and participation 4 workshops, writing of workshop reports			
Participation in 5 SCM			
Preparation / participation / follow-up of the final conference			
Finalisation guide			
TOTAL			

2. Selection criteria:

Tenderers are asked to provide a detailed description how they plan to carry out the tasks listed under 4. Tenderers are asked to provide references of similar orders of the last three years. The references shall include

- working result of the order
- contact person with contact details, expertise and language skills

3. Award criteria

The contract will be awarded whose offer represents the best value for money – taking into account the following criteria:

Experience in technological transformation and its impact on industrial relation-related subjects	20 points
Implementation of the tasks, experience of staff, language skills	20 points
Methodology, workplan, schedule, transparency of the bid	20 points
Price	40 points

There is a maximum of 100 points and it should be noted that the contract will not be awarded to a tenderer who receives less than 70% of the award criteria.

4. Content of the bids

The bids have to include

- Technical and Financial offer including schedule and conduction, signed by the legal representative
- References
- Name, expertise and language skills of the expert, who will implement the activities
 - All information necessary to enable the project promoter to assess the selection criteria
 - Name of the legal representative
 - Bank details

5. Presentation of the bids

The bids have to be sent in electronical and paper version. They must include the signature of the legal representative and the CV of the expert(s) implementing the action. Please send your offer to

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Deadline for the offer: 15 March 2019