

# Employability in the Railway Sector in the Light of Digitalisation and Automation (EDA Rail)



## Call for tenders

### Scientific expertise on: Employability in the Railway Sector in the Light of Digitalisation and Automation (EDA Rail)

Dear Sir / Madam,

If you wish to participate in this invitation to tender, you are asked to submit your bid by **3 April 2020**. You may do this

- a) by registered letter (including private messenger service), to be posted no later than **3 April 2020** to the following postal address:

**Community of European Railway and Infrastructure Companies (CER)**  
**Ester Caldana**  
**Avenue des Arts, 53**  
**1000 Brussels**  
**Belgium**

- b) **and** by e-mail by **12:00 hrs** on **3 April 2020** to [ester.caldana@cer.be](mailto:ester.caldana@cer.be) and [Almut.spittel@eva-akademie.de](mailto: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. Contracting body will be EVA Europäische Akademie für umweltorientierten Verkehr gGmbH.

# Tender specifications for subcontracting external expertise

## Part I – The contract

### 1. Title of the contract

**Scientific expertise on: Employability in the Railway Sector in the Light of Digitalisation and Automation (EDA Rail)**

### 2. Background and context of the contract

With the work program 2018/2019 the social partners in the railway sector, the Community of European Railway and Infrastructure Companies (CER) and the European Transport Workers' federation (ETF) agreed on a **review of the existing CER/ETF Joint Recommendations with the willingness of follow-up actions, e.g. negotiations and transformation into binding agreements (within the meaning of Article 155 TFUE)**. They will start with two sets of joint recommendations, "The concept of employability"<sup>1</sup> as one of them.

**The Sectoral Social Dialogue Committee for Railways has delved into the concept of employability and its practical meaning for railways in different occasions since 2000.** These activities led to the 2007 joint conclusions on the concept of employability in the railway sector, which stressed how employability should be part of an HR strategy aimed at addressing change and the flexibility and mobility needs connected to it in a preventive manner. The text also highlighted the respective responsibilities of the company and the employee, and the **key role of social dialogue to tackle employability**. It is necessary to question whether the concept needs to be reviewed and modernised (e.g. sustainable work concept). Digitalisation and automation is a relevant and suitable trend for this review.

The rail social partners have included the review of their joint recommendations on employability in the **2018-2019 SSDC work programme**, deciding to focus on the changes due to digitalisation and automation because of their profound impact at all levels of the business, with consequences for employment and working conditions.

The choice is consistent with the priorities of the European Commission, which will continue its analysis of the impact of automation on the transport labour force and possibly take initiatives under the new term (2019-2024). "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."<sup>2</sup> **The rail social partners wish to be ready to contribute to the upcoming political debate on the basis of an in-depth and EU-wide analysis of the issues. With this project, they are aiming at the following concrete results:**

- ❖ Review 2007 joint recommendations on the concept of employability (SSD work programme 2018-2019), the concept of employability as such and decision on follow-up actions.

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<sup>1</sup> CER, ETF, EIM (2007): The concept of employability in the Railway Sector. Recommendations.

<sup>2</sup> 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.

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- ❖ Map the drivers of change that have an impact on employability. Among these drivers of change, focus on digitalisation and automation.
- ❖ Inform and advise rail companies and trade unions representatives about existing good practices in the field of change management and employability and just transition, with the objective to maintain attractive working conditions in the sector.

### **3. Purpose of the contract**

**External expertise** on employability challenges linked to digitalization, automation and other trends will be necessary to carry out the research work.

The main purpose of the external expertise is to support the social partners with desk-top and empirical research. In particular, we are looking for HR and industrial relations professionals or consultants with hands-on experience on the project theme, who will be responsible for research work, interviews and drafting some of the project deliverables.

### **4. Tasks of the external expert**

In close cooperation with the project steering committee the experts will carry out the following activities:

#### **Data gathering and analysis:**

1. Identify and analyse the main drivers of change
2. Map and analyse the main domains affected by the changes that are relevant for employability
3. Map and analyse the employers' and employees' needs on these topics
4. Collect examples and best practices of how companies, employees and trade unions deal with these changes
5. Interviews with companies and trade unions to collect more in-depth information on all the points listed above (by phone or face-to-face, e.g. at the margins of steering committees and workshops)

#### **Participation in project activities:**

- Participation in selected steering committee meetings
- Participation and support to the moderation during workshops
- Participation in final conference

#### **Drafting and production of deliverables:**

- Project report based on the information collected during desk-top research, interviews and workshops
- Input to factsheets outline and script for videos
- Input to list of do's and don't's for social partners' approaches to employability and digitalisation

The working language of the external expert has to be English. Capacity to work in more EU languages will be considered an asset.

## 4.1 Detailed description of tasks

### 1) Research external expert

**Date, Duration:** Months 2-17, 16 months over the whole project duration

**Responsible:** external expert

**Tasks:**

- Classification of the aspects of the concept "employability" in the changing world of work;
- Identify and analyse the main drivers of change (WHY): Secondary and empirical research on drivers of change (digitalisation and automation, demographic shift), domains affected, key aspects. This part can build on existing material produced by different bodies and initiatives (e.g. Shift2Rail; European Commission; EU Agency for Railways, ETUC ETUI, Eurofound, OSHA Bilbao etc.);
- Map and analyse the main domains affected by the changes that are relevant for employability, and the employers' and employees' needs on these topics (WHAT);
- Identify and collect examples and best practices of how companies, employees and trade unions deal with these changes (HOW): Identifying case studies and best practice examples of company and trade union measures through interviews and information collected during workshops;
- Creating interview guidelines; conducting interviews;
- Contribution to steering committee meetings, workshops and final conference;
- Drafting the report and fact-sheets, description of case studies / good practices at company level;
- List of do's and don't's for social partners' approaches to employability and digitalisation;
- Script for the videos.

### 2) Participation in the Project Steering Committee Meetings 1-5

**SCM 2:** Brussels, month 6, 1 day

**SCM 3:** Prague (following Workshop 2), month 10

**SCM 4:** Lyon (following Workshop 3), month 12

**SCM 5:** Brussels, month 14

**Tasks**

- Presentation and discussion of research results
- Support to moderation of sessions

### 3) Participation in the Workshop 1-4

**WS 1:** Stockholm, month 9, 2 days

**WS 2:** Prague, month 10, 2 days

**WS 3:** Lyon, month 12, 2 days

**WS 4:** Frankfurt, month 13, 2 days

**Tasks:**

- Based on the research results and previous contacts established with national social partners, the experts will support the steering committee in identifying companies, trade unions or external institutions that can present case studies during workshops.
- They will participate in the discussion among workshop participants to identify topics for focus groups.
- Individual interviews with workshop participants.

#### **4) Participation in the Final Conference**

**Place:** Brussels

**Date, Duration:** Month 15, 1 day

**Tasks**

- Presentation of project main findings
- Presentation of the project deliverables

### **4.2 Guidance and indication on tasks execution and methodology**

The planned methodology of the tasks is 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 contracting body. The final versions shall be agreed within the Steering Committee and final acceptance shall be communicated to the expert via the contact person of the contracting body. The agreement on the texts shall be in a written form.

## **5. 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:

- scientific experience in the fields of European and national employment topics, especially in the context of technological transformation;
- personnel with relevant language skills: English required, other EU languages are an asset;
- experience in realizing empirical studies and interviews in different countries with different stakeholders;
- familiarity with industrial relations and social dialogue;
- experience in consulting and supporting international projects with diverse partners;

- capacity to manage the tasks within the budget maximum amount.

The selection committee will also positively assess candidates' proven experience in moderating working sessions and in developing content for multi-channel deliverables such as videos, factsheets.

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

## 6. Time Schedule and reporting

Delivery of the final products shall be latest on the date of **30 April 2021**.

Month	Activity	Place	Participants	Duration
1-2	Call for tenders			
2	SCM 1	Brussels	13 persons: 12 steering committee members, 1 EVA	1 Day
3-5	Secondary research, Employability concept, Creating interview guidelines Identifying case studies and best practice examples		External experts	
6	SCM 2	Brussels	14 persons: 12 steering committee members, 1 expert, 1 EVA	1 Day
7-9	Secondary research, interviews to prepare the workshops		External experts	
9	Workshop 1	Stockholm	35 persons: 12 SCM, 18 guests, 2 experts, 2 speakers, 1 EVA	2 Days
10	Workshop 2	Prague	35 persons: 12 SCM, 18 guests, 2 experts, 2 speakers, 1 EVA	2 Days
10	SCM 3	following WS 2	14 persons: 12 steering committee members, 1 expert, 1 EVA	1 Day
12	Workshop 3	Lyon	35 persons: 12 SCM, 18 guests, 2 experts, 2 speakers, 1 EVA	2 Days
12	SCM 4	Following WS 3	14 persons: 12 steering	1 Day

			committee members, 1 expert, 1 EVA	
13	Workshop 4	Frankfurt	35 persons: 12 SCM, 18 guests, 2 experts, 2 speakers, 1 EVA	2 Days
14	SCM 5	Brussels	14 persons: 12 steering committee members, 1 expert, 1 EVA	1 Day
15	Dissemination Conference	Brussels	100 participants	1 Day
16-17	Production of deliverables			
18	Dissemination of deliverables Report to the European Commission			

## 7. 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 30 April 2021.

## 8. Price

Maximum gross costs including any VAT payments that EVA Akademie would be liable for under the reverse-charge system, are set at a flat sum of **60,000 EUR**. This price represents the complete 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 max. 2 persons of the expert institution 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 AMOUNT WILL BE 60.000,00 EUR INCLUDING VAT LUMP SUM.**

<u>TASKS</u>	<u>Unit costs</u>	<u>NUMBER OF WORKING DAYS</u>	<u>TOTAL</u>
<p><b>Data gathering and analysis:</b></p> <ol style="list-style-type: none"> <li>1. Identify and analyse the main drivers of change</li> <li>2. Map and analyse the main domains affected by the changes that are relevant for employability</li> <li>3. Map and analyse the employers' and employees' needs on these topics</li> <li>4. Collect examples and best practices of how companies, employees and trade unions deal with these changes</li> </ol> <p>Interviews with companies and trade unions to collect more in-depth information on all the points listed above (by phone or face-to-face, e.g. at the margins of steering committees and workshops)</p>			
<p><b>Participation in project activities:</b></p> <ul style="list-style-type: none"> <li>- Participation in selected steering committee meetings</li> <li>- Participation and support to the moderation during workshops</li> <li>- Participation in final conference</li> </ul>			
<p><b>Drafting and production of deliverables:</b></p> <ul style="list-style-type: none"> <li>- Project report based on the information collected during desk-top research, interviews and workshops</li> <li>- Input to factsheets outline and script for videos</li> <li>- Input to list of do's and don'ts for social partners' approaches to employability and digitalisation</li> </ul>			
<b><u>TOTAL</u></b>			



## 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

**At least 5 different institutions/tenderers will be invited to participate in the call for proposals. The call will be published on the homepages of CER, ETF and EVA Akademie.**

## 3. Award criteria

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

Experience and expertise regarding European and national employment topics, company and industrial relations related subjects	30 points
Workplan, schedule, implementation of the tasks	30 points
Methodology, transparency of the bid	20 points
Price	20 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

**Community of European Railway and Infrastructure Companies (CER)**

**Ester Caldana**

**Avenue des Arts, 53**

**1000 Brussels**

**Belgium**

Via e-mail to: [ester.caldana@cer.be](mailto:ester.caldana@cer.be) and [almut.spittel@eva-akademie.de](mailto:almut.spittel@eva-akademie.de)

Tel. Ester Caldana: +32-2-213 08 36, Tel. Almut Spittel: +49-30-3087526

**Deadline for the offer: 3 April 2020**

## Annex

### Detailed work program

#### Preparation

##### 5) Tendering procedure external expert

**Date, Duration:** month 1, 1 month

**Responsible:** EVA Akademie in consultation with ETF and CER

##### 6) Project Steering Committee Meeting 1

**Place:** Brussels

**Date, Duration:** month 2, 1 day

**Participants:** 13 persons: 6 ETF, 6 CER, 1 EVA

**Language:** English, German, French

**Responsibilities:** contentual: CER, ETF, EVA, expert, methodical: EVA, organisation: EVA

##### Program

- Overall project discussion
- Detailed working schedule
- Evaluation of the offers from external experts
- Selection of the external expert
- Discussion of drivers of change
- Tasks of the external expert
- Identify topics for focus groups
- Detailed schedule and design of the workshops

#### Implementation and dissemination

##### 7) Research external expert

**Date, Duration:** Months 2-17, 16 months over the whole project duration

**Responsible:** external expert

##### Tasks:

- Classification of the aspects of the concept "employability" in the changing world of work;
- Secondary and empirical research on drivers of change (digitalisation and automation, demographic shift), domains affected, key aspects. This part can build on existing material

produced by different bodies and initiatives (e.g. Shift2Rail; European Commission; EU Agency for Railways, ETUC ETUI, Eurofound, OSHA Bilbao etc.);

- Creating interview guidelines; conducting interviews;
- Contribution to steering committee meetings, workshops and final conference;
- Identifying case studies and best practice examples of company and trade union measures through interviews and information collected during workshops;
- Drafting the report and fact-sheets, description of case studies / good practices at company level;
- List of do's and don't's for social partners' approaches to employability and digitalisation;
- Script for the videos.

## 8) Project Steering Committee Meeting 2

**Place:** Brussels

**Date, Duration:** month 6, 1 day

**Participants:** 14 persons: 6 ETF, 6 CER, 1 EVA, 1 expert

**Language:** English, German, French

**Responsibilities:** contentual: CER, ETF, EVA, expert, methodical: EVA, organisation: EVA

### **Program**

- Discussion of preliminary research results
- Discussion of the concept of employability
- Discussion in the focus groups: drivers of change, main domains affected, key aspects
- Review of the concept and joint recommendations of employability
- Preparation of the workshop content: clustering identified case studies and key topics in the regions, drafting the program of the 4 workshops

## 9) Workshop 1 - Digitalisation: New skills, tools and training methods for rail staff

**Place:** Stockholm

**Date, Duration:** month 9, 2 days

**Participants:** 35 persons: 14 persons steering committee (6 ETF, 6 CER, 1 EVA, 1 expert), 18 guests (6 CER, 6 ETF), 2 speakers

**Language:** English, German, French, Swedish, + 1

**Responsibilities:** contentual: CER, ETF, EVA, expert, methodical: EVA, organisation: EVA

**Objectives:** Map and analyse the main domains affected by the changes that are relevant for employability, and the employers' and employees' needs on these topics (WHAT); Identify and collect examples and best practices of how companies, employees and trade unions deal with these changes (HOW).

### **Program**

- a) Day 1: Experts from companies, trade unions or external institutions present case studies about change management following a technological development or other process that has an impact on the main domains related to employability (conditions of employment, professions and tasks/Skills requirements, continuous learning and training needs / multi-skilling, occupational risks (physical health, mental health and safety, work organisation, working conditions / working environment / ergonomics)
- b) Discussion among workshop participants and identification of topics for focus groups.
- c) Day 2: Focus groups on topics connected to the presentations and /or pre-identified by the steering committee.
- d) Running in parallel: consultant's individual interviews with workshop participants.

### **10) Workshop 2: Internal measures to manage change**

**Place:** Prague

**Date, Duration:** month 10, 2 days

**Participants:** 35 persons: 14 persons steering committee (6 ETF, 6 CER, 1 EVA, 1 expert), 18 guests (6 CER, 6 ETF), 2 speakers

**Language:** English, German, French, Czech, + 1

**Responsibilities:** contentual: CER, ETF, EVA, expert, methodical: EVA, organisation: EVA

**Objectives:** Map and analyse the main domains affected by the changes that are relevant for employability, and the employers' and employees' needs on these topics (WHAT); Identify and collect examples and best practices of how companies, employees and trade unions deal with these changes (HOW).

#### **Program**

Refer to Workshop 1

### **11) Workshop 3: Automation / Digitalisation; New models of maintenance**

**Place:** Lyon

**Date, Duration:** month 12, 2 days

**Participants:** 35 persons: 14 persons steering committee (6 ETF, 6 CER, 1 EVA, 1 expert), 18 guests (6 CER, 6 ETF), 2 speakers

**Language:** English, German, French, Italian, + 1

**Responsibilities:** contentual: CER, ETF, EVA, expert, methodical: EVA, organisation: EVA

**Objectives:** Map and analyse the main domains affected by the changes that are relevant for employability, and the employers' and employees' needs on these topics (WHAT); Identify and collect examples and best practices of how companies, employees and trade unions deal with these changes (HOW).

#### **Program**

Refer to Workshop 1

## 12) Workshop 4: Digitalisation: 1) The role of social partners in anticipating and accompanying change; 2) Impact of change on employee-customer relations

**Place:** Frankfurt

**Date, Duration:** month 13, 2 days

**Participants:** 35 persons: 14 persons steering committee (6 ETF, 6 CER, 1 EVA, 1 expert), 18 guests (6 CER, 6 ETF), 2 speakers

**Language:** English, German, French, + 2

**Responsibilities:** contentual: CER, ETF, EVA, expert, methodical: EVA, organisation: EVA

**Objectives:** Map and analyse the main domains affected by the changes that are relevant for employability, and the employers' and employees' needs on these topics (WHAT); Identify and collect examples and best practices of how companies, employees and trade unions deal with these changes (HOW).

### Program

Refer to Workshop 1

## 13) Project Steering Committee Meetings 3-5

### **Place, date:**

SCM 3: Prague (following Workshop 2), month 10

SCM 4: Lyon (following Workshop 3), month 12

SCM 5: Brussels, month 14

**Duration:** 1 day

**Participants:** 14 persons: steering committee (6 ETF, 6 CER, 1 EVA, 1 expert)

**Language:** English, German, French

**Responsibilities:** contentual: CER, ETF, EVA, expert, methodical: EVA, organisation: EVA

### **Program**

- Review of the concept and joint recommendations of employability
- Discussion of drivers of change (WHY)
- Discussion of main domains affected (WHAT)
- Discussion of best practice examples (HOW)
- Design of the workshops
- Discussion of follow-up actions according to the work program including a modernised "employability" concept

## 14) Final Conference

**Place:** Brussels

**Date, Duration:** Month 15, 1 day

**Participants:** 100 persons: 14 persons steering committee (6 ETF, 6 CER, 1 EVA, 1 expert), 6 persons focus groups, 80 guests (30 CER, 30 ETF, 20 European institutions and stakeholders)

**Language:** English, German, French, + 3

**Responsibilities:** contentual: CER, ETF, EVA, expert, methodical: EVA, organisation: EVA

### **Program**

- Presentation of project main findings
- Discussion with stakeholders
- Discussion with politicians
- Presentation of the project deliverables

## **Follow-up and reporting**

### **15) Production and dissemination of project results**

**Date, Duration:** Months 16-18

**Responsible:** dissemination: social partners, production and dissemination: EVA

#### **Tasks:**

- Layout and translation of the deliverables
- Publication of the results via user-friendly deliverables. The member organisations of the social partners will function as multipliers during and after the project duration.
- The regular meetings of the social partners will be used as a platform to communicate the project progress and the results. The results of the project will be published on the websites and in newsletters of the social partners and the project promoter.
- The report will be available in English, German, French and three more languages. It will be distributed to all members of the social partners involved in the project.

### **16) Reporting to the European Commission**

**Date, Duration:** Months 18

**Responsible:** CER with the support of the project partners

#### **Tasks:**

- Drafting the report to the European Commission