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European Transport Workers' Federation
Fédération Européenne des Travailleurs des Transports
Europäische Transportarbeiter-Föderation
Federación Europea de los Trabajadores del Transporte

Brussels, 11 January 2019

**TENDER SPECIFICATION FOR SUBCONTRACTING
ETF AUTOMATION & DIGITALISATION TOOLKIT (EADT)
VS/2018/0366**

***EXTERNAL EXPERT – COLLECTIVE BARGAINING,
POLITICAL LOBBYING & CAMPAIGNING, WORKERS' REPRESENTATION***

1) Purpose of the contract

The ETF is looking for an external expert who will perform a desktop research and compile an ETF Automation & Digitalisation Toolkit including modules on collective bargaining, political campaigning & lobbying and workers' representation. The draft Toolkit will be subject to a "reality check" during five events dedicated to individual transport modes, women and youth. Subsequently, the expert will integrate the feedback from these events into the text and compile a final version that will be presented at a dissemination event.

2) Tasks to be performed by the contractor

a. Description of the tasks

The expert has to perform the following tasks:

- desktop research on best practices concerning automation & digitalisation with a specific focus on collective bargaining, political campaigning & lobbying and workers' representation
- compilation of an easy-to-use ETF Automation & Digitalisation toolkit which shall include :
 - o a model agreement on implementation of new technologies. It should be made up of modules tackling the different dimensions at stake (i.e. training/retraining, working time, timing/modalities for involving the unions when new technologies are implemented, tackling new OSH challenges, financial compensation in case of layoffs, etc.) which can then be applied to different contexts, i.e. in case of retrofitting of existing workplaces or construction of greenfield projects presenting more advanced technologies.
 - o guidance for unions on how to build their strategies on automation/digitalisation agreements and/or inserting automation/digitalisation clauses in general collective bargaining agreements
 - o a conceptual framework presenting all the challenges for transport workers and the societies at large related to automation and digitalisation that unions should



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raise when lobbying EU, national and local policy makers, when campaigning towards the general public and when raising workers' awareness on the challenges and opportunities coming from automation and digitalization. This should include considerations on employment levels and labour market policies, education, retraining and employability of current employees, taxation policies and infrastructure financing, impact on local economies and creation of transition funds.

- a hands-on tool on how unions can adapt their structures, political, organising and representation strategies in order to stay relevant for transport workers, organise new workers in the new professions/profiles created in the transport sector by automation and digitalization, and better represent their interests.
- participation in five separate events for civil aviation, land transport (rail, road and urban public transport), water transport (inland waterways, maritime transport, ports and docks), youth and women
- incorporation of the feedback received during the dedicated events into the final version of the Toolkit
- production of a YouTube video (max. 5 min) raising the awareness about automation & digitalisation challenges for transport workers and promoting the Toolkit
- presentation of the Toolkit during the dissemination event
- participation in 3 Steering Committee meetings

b. Guidance and indications on tasks execution and methodology

Concrete guidance will be given by the steering committee of the project and the project manager during implementation.

3) Reasons for contracting out implementation work

The external expert is needed due to the specific expertise in industrial relations and change management as well as due to organisational constraints within the ETF.

4) Expertise required and profile

The tenderer shall prove his/her expertise with examples of his/her work. The contract will only be awarded to tenderers that can prove that they fulfil the following criteria:

- fluent in English (both oral and written)
- sound background in industrial relations
- expertise in communication
- knowledge of the impact of automation and digitalisation processes on workers and trade unions
- expertise in developing didactic materials
- extensive writing skills
- knowledge of labour legislation
- experience in change management



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- respect of budgetary constraints
- knowledge of the transport sector is an asset

The expert can be an individual, an organization or a consortium made up of several entities.

5) Time schedule and reporting

The expert will be asked to work 80 days from 1 March 2019 until 31 December 2020, including attending SC meetings, dedicated events and the dissemination events. Travel, accommodation and subsistence costs for journeys will be reimbursed according to EU rules.

The preliminary breakdown of working days is as follows:

- 5 days initial analysis of the legislation best practices available
- 20 days drafting the Toolkit
- 3 x 1 day steering committee
- 5 x 4 days preparation for the dedicated events
- 5 x 3 days participation in the dedicated events
- 7 days incorporation of the feedback from the dedicated events
- 4 days preparation for the dissemination event
- 3 days participation in the dissemination event
- 3 days coordination with the project promoter

The expert will work under the guidance of and will report to the Steering Committee and the Project Manager. The specific deadlines for deliverables will be set jointly by the contractor and the ETF according to the project's timeline.

6) Payments

The expert will receive an advance and final payment following the EU rules and upon receipt of a correct invoice. Payments will be made in three phases:

- 30 per cent upon presentation of the draft Toolkit
- 35 per cent after the mid-term assessment by the Steering Committee
- 35 per cent after the work is finalised

The payment of the 2nd and 3rd instalment will be made subject to the approval of the Steering Committee considering the quality and completeness of the work in the respective stage of the project.



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7) Price

The maximum budget available (covering all taxes including VAT) is 48,400 EUR, i. e. 80 days x 605.00 EUR (without travels, hotel and subsistence costs).¹

8) Selection criteria

The offers will be examined by the SC against the following criteria:

Criterion	Description	Value
Price	Best value for money	30 per cent
Quality and expertise	Proven expertise in: <ul style="list-style-type: none">- communication- developing of didactical materials- industrial relations- knowledge of labour legislation- change management	40 per cent
Approach	Structured and open approach	20 per cent
Ability to write and speak in clear and concise English		10 per cent
TOTAL		100 per cent

9) Award criteria

The contract will be awarded to the tender offering the best value for money, taking into account the selection criteria developed under 9. The respect of the principles of transparency and equal treatment with a view to avoiding any conflict of interest will be undertaken. It should be noted that the contract will not be awarded to a tenderer who receives less than 70% on the Award Criteria.

10) Content and presentation of the bids

Content of the bids

The bids must cover all the elements stated above and in particular prove suitability of the tenderer and his expertise.

The bids must indicate how candidates meet the criteria listed above, present a draft working plan, a draft schedule for the tasks to be performed and indicate the total price of the consultancy. In case of bids submitted by individual candidates, a CV should be attached. This

¹ services delivered from outside of Belgium are subject to Belgian 21 per cent VAT which must be considered as included in the total price



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should include a list of publications and works done by the applicant in the fields relevant for the tasks to be performed.

References should also be provided.

In case of bids submitted by organisations a list of the organisation's activities in fields relevant for the tasks to be performed should be attached as well as the CVs of the people who will be involved in the project.

Organisations and consortia should also indicate a contact person who will be responsible for the supervision of the tasks and who will report to the project promoters.

Only bids in English will be considered.

Presentation of the bids

The bids, including a CV, must be sent **by e-mail to:** Livia Spera at l.spera@etf-europe.org **by Friday 11 February 2019 COB.**



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Annex – General background on automation in transport

As pointed out by the EESC, “digitalisation and robotisation in the field of the mobility of people and the transport of goods provide society with several potential benefits such as better accessibility and convenience for passengers, efficiency and productivity for logistics, improved traffic safety and reduced emissions. At the same time, there are concerns relating to safety, security, privacy, labour and the environment.”²

In its path, many jobs in transport will be at risk, some at the very short term such as parcel delivery services, and many in the medium or long term. Automation & digitalisation do not make any distinction and will impact on all transport and logistics jobs in one way or another. Some functions will be completely replaced by automated processes, solutions or systems, others will be fundamentally revised. The future will evolve around skills & competencies and one’s capacity to accumulate and absorb permanent change via retraining. The ability to evolve will be the key denominator for a sustainable job in transport related services.

Academic research indicates huge regional and sectoral differences in the implementation of automated processes as well as a general delay as a changing liability causes unrest with insurance companies, but most important with competent authorities. Another major delaying factor is the huge public/private investments required regarding new IT infrastructure. Only financially strong companies (mostly multinationals) can invest on a stand-alone basis, but as digitalisation also needs a massive overhead capacity, a large responsibility remains in the hands of governments and Member States.

This delay provides the European Transport Workers Federation with a valuable asset which is time – time to prepare for change – time to prepare a just and fair transition based on the premises that everyone has to benefit from introduction of automation and digitalisation. No one may be left behind and in order to ensure this ambition, policies have to be put in place at local, regional, national and European level.

There is a number of specific challenges related to automation & digitalisation in the individual transport sectors including:

Civil aviation

- remotely piloted aircraft systems (drones)
- remote control towers
- automation of air traffic management (cf. SESAR³)

Inland waterways

- backlog in innovation, relatively old fleet (financing is a problem)
- general awareness amongst affiliates on automation & pilot projects is very low
- consequences of automated navigation on the crewmembers (e. g. shift of tasks from ship to shore, responsibilities, legal consequences in case of an accident)
- (positive) effect on health & safety

² EESC Opinion TEN/632 Implications of the digitalisation and robotisation of transport for EU policy-making

³ <https://www.sesarju.eu/discover-sesar>



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Annex – General background on automation in transport

- use of simulators
- automated or remotely controlled locks

Maritime transport

- impact of automated ships on jobs/skill needs for maritime professionals (at sea/onshore)
- financial burden due to high investment costs to adapt/retrofit existing fleet
- using new technologies to enhance the levels of safety, security and quality of work at sea
- address the question of liability in case of accidents
- ensure automated systems are safe/robust to comply with legal and safety requirements
- make sure investments in R&D are channelled towards alternative green technologies to remove the dependency on fossil fuel and help creating green jobs

Ports and docks

- automated port operations
- remote-controlled port operations

Railways

- driverless trains
- digitalisation of command and signalling equipment
- use of drones to supervise tracks

Road transport

- autonomous lorries

Urban Public Transport

- Mobility as a service (MAAS)

Uber



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