# Specification of Services for an Online Survey of White-Collar Workers in the Industrial Sector as Part of the **BEREP Project** for Better Representation of White-Collar Workers for a Sustainable Future of Industrial Relations in Manufacturing

## The Project and Its Context

The BEREP Project for Better Representation of White-Collar Workers for a Sustainable Future of Industrial Relations in Manufacturing tackles the issue of trade-union representation of white-collar workers in the manufacturing industry. An EU-funded project, BEREP uses online surveys to examine the occupational conditions of white-collar workers in the industrial sector. Designed to be highly representative, the surveys are set to be conducted in Germany, Finland and France and will focus on a subjective assessment of occupational conditions, autonomy, workload, and work-life balance. The aim will be to identify organisational strategies for trade unions. The survey thus also examines attitudes towards trade unions and expectations regarding the work that trade unions do. Our survey has been structured to interview white-collar workers aged 18 to 55 and currently employed by industrial companies in Germany, Finland and France. The surveys are intended to be highly representative of industrial-sector staff in the three countries and to reflect the employment structure of industrial-sector white-collar workers in the three countries.

The project ends on 31 July 2023.

## Background

The number of white-collar workers in the manufacturing industry is increasing throughout Europe, both in absolute terms and as a proportion of total employees in the sector. Today, around 41% of employees in the manufacturing industry in Europe are white-collar staff; in some countries, they already outnumber blue-collar workers. The manufacturing industry was and remains the stronghold of trade unions and the backbone of national industrial-relations systems in many European countries, both in terms of preparing and modernising collective agreements and when it comes to the stabilisation of collective bargaining systems. Alongside these changes to staffing structures, things are also shifting with regard to how trade unions represent worker interests. This is because skilled workers – formerly at the core of trade unions’ advocacy efforts – are becoming less prominent. At the same time, traditional trade unions are finding it difficult to recruit white-collar staff as members and to effectively advocate for their interests. A further challenge is the continuing presence of remote work following the Covid-19 pandemic: this has led to less contact and less intensive discussion between staff and management both on the individual and collective levels, thus making contact between trade unions and white-collar workers all the more difficult.

Against this backdrop, IAQ is working together with industriAll Europe to investigate what conditions might give rise to successful unionisation of white-collar workers – something that is key to preservation of trade unions’ organisational power and thus also to the social partnership practices hitherto developed in the industrial sectors. This is being done in collaboration with several national member associations of industriAll Europe. The following questions are front and centre:

1. What are the characteristics and occupational conditions that define white-collar work in Europe?
2. With regard to occupational conditions and the role and function of trade unions, what concerns and attitudes can be identified amongst white-collar workers?

# 3. Type and Scope of Services

The planned online surveys will seek to find out more about the occupational conditions and concerns of the growing group of industrial white-collar workers – and about the challenges they face.

Sampling is to be carried out via an online access panel. In selecting providers for the online access panel, particular attention must be paid to the quality criteria (e.g. recruitment; taking into account people who are not easily reachable online; incentivisation; quality checks with regard to things such as response behaviour, etc.). Quotas will be specified in order to ensure a reasonably representative composition of the sample. Characteristics might include gender, age or professional status/position.

Against the backdrop of the research questions, the contractors must deliver a standardised questionnaire for a largely principal-developed, self-administered online survey; they must also organise and conduct a broadly representative individual survey. If a provider is able to offer price-equivalent alternatives to an online access survey, these will also be considered.

The aim is to conduct a highly representative online survey of around 1000 white-collar manufacturing-industry workers per country. We estimate the survey will last 4-6 weeks, including the sending of reminders.

The following requirements apply:

* The survey must speak with employees aged 18-55 working in the industrial sectors in Germany, Finland and France.
* The target *n* per country is 1000. This will allow in-depth analyses and help meet representativeness criteria to the best degree possible.
* The survey takes approximately 25-30 minutes per questionnaire.
* The interview must take place immediately once the contract has been awarded.
* With regard to the questionnaire, the service provider is responsible for initial consultation, sampling and programming. It is also responsible for pre-tests and for conducting the online survey. It should be possible to answer the online survey both on a traditional PC/laptop and on a smartphone/tablet. The data must be provided to the principal as an SPSS and statistics file (or csv file).

## 3.1 Documentation and Data Protection

The contractors are responsible for compliance with data protection and data security regulations per the European General Data Protection Regulation and the various current laws implementing this regulation. Before the cleaned data file is delivered, the interviewees must be anonymised by the service provider. The cleaned data files must be delivered via secure download one week after the survey has ended.

## 3.2 Implementation Plan and Timetable

An implementation plan forms part of the tender

* Implementation period: within three months of the order being assigned.
* Consultation/discussion/implementation/pre-testing of the principal’s developed draft questionnaire within 30 days of the order being assigned. The survey should start in January 2024.
* A presentation of no more than six pages in length (A4, 1.5 line spacing, 12 pt. font size) must be submitted by the tendering company, in German, English or French.
* Meetings will take place by arrangement, digitally and in English.

## 3.3. Service Criteria

* + Contractors must meet the following suitability criteria and provide evidence in the form of a self-declaration stating the survey topic, principal, survey period, sample size and a brief description of the methodology (evidence must include at least three references from the last five years; please complete a separate reference sheet for each reference, see Appendix 1: Suitability Criteria).
	+ Relevant skills and experiences in conducting highly representative online surveys of a comparable scale (*n* >= 1000)
	+ Experience with representative sampling and/or quota-based methods
	+ Experience with online access panels or alternatives
	+ Methodological quality of the empirical studies
	+ Experience in organising international studies

These criteria can be verified with more than one reference. Individual references do not have to provide evidence of all criteria.

Bidders can submit bids for one, two or three countries (Germany, Finland, France).

If a bidder does not provide the required references, the bid must be rejected.

## 3.4. Evaluation

The evaluation is based on a simple guideline method:

  per country

A maximum of 1000 points can be awarded per country.

## 3.5. Evaluation Criteria

The following evidence must be provided for the assessment (please refer to the evaluation matrix for more details):

1. Proof of no less than three references from the last five years; please complete a separate reference sheet for each reference, see Appendix 2: Evaluation Criteria. These references can refer to the same projects that were submitted with regard to suitability. The references will be evaluated for the following qualifications:
* Representative surveys (individual surveys) on similar work-related topics, occupational conditions or trade-union/works-council activity
1. Implementation plan addressing the following points:
	* Presentation of subject-related and content-related suitability with regard to the research questions
	* Presentation of an efficiently organised sampling/acquisition procedure
2. Reference projects from the project leadership that will be appointed:

Proof of no less than three references from the last five years; please complete a separate reference sheet for each reference, see Appendix 2: Evaluation Criteria. The project leadership’s references can refer to the same projects as listed above. The references will be evaluated for the following qualifications:

Experience with highly representative online surveys on labour issues, occupational conditions or trade-union/works-council activity.

## 3.6. Documents Required

The tender must include:

* A presentation of the company
* Specification of which country or countries the offer applies to
* Reference Sheet 1 (Appendix 1: Suitability Criteria)
* Reference Sheet 2 (Appendix 2: Evaluation Criteria)
* Implementation Plan (no more than six pages) including time frame, method and procedure for the questionnaire, description of the online access panel (including the quality criteria and sampling) and the staff available for project management and conducting interviews (with brief overview of qualifications and experience) (Evaluation Criteria 2)
* Gross price for your tender including all additional costs
* The tender can be submitted in any one of the principal’s three official languages (German, English and French).

**Please send your offer by Friday, 22 December 2023 at the latest by e-mail to**

Katja.Grosser@industriall-europe.eu

**Acceptance of the Bid:**

Per simple guideline method, in which the contract is awarded to the tender that offers the best value in terms of the evaluation criteria.