



**EU-CHINA Project “Improving China’s Institutional Capacity towards Universal Social Protection”**

**Call for proposals:  
Policy Briefs, Podcasts and future communications on  
“Strengthening Capacity for Universal Social Protection in China”**

The ILO Country Office for China and Mongolia is seeking proposals from qualified national and international individuals or institutions to develop policy briefs, podcasts and future communications on “Strengthening Capacity for Universal Social Protection in China”. The assignment is part of the EU-China Project “Improving China’s Institutional Capacity towards Universal Social Protection (CHN/18/01/EUR)”.

For further details about the assignment, please see the **Terms of Reference** below.

Candidates interested in this consultancy are invited to submit a technical proposal in Chinese or English and a detailed financial proposal as per the following details:

- 1. Technical proposal** in English or Chinese not exceeding 2 pages:
  - 1) Name and title of author(s)
  - 2) Curriculum Vitae of author(s)
  - 3) Affiliated institution(s)
  - 4) Date of an original study or studies and whether they were published and in what forms in case of publications
  - 5) Proposal for Policy Brief including
    - 300 word summary of the evidence or research findings
    - Proposed length of the brief in number of words
    - Paragraph on main research methods used
- 2. A detailed financial proposal** specifying number of days, daily fee rate and other relevant expenditures.

The technical and financial proposals must be placed in two separate emails, and submitted to [frotal@ilo.org](mailto:frotal@ilo.org). The submission must be marked: “China EU Social Protection Project: Policy Brief – Technical Proposal” and “China EU Social Protection Project: Policy Brief – Financial Proposal.”

Submissions are to be made by 20<sup>th</sup> March, 20<sup>th</sup> June, 20<sup>th</sup> September and 20<sup>th</sup> December of 2020 and 2021. The latest submission is expected by 20<sup>th</sup> December 2021.

**Terms of Reference**  
**International and national consultants to develop Policy Briefs, Podcasts and  
future communications on “Strengthening Capacity for Universal Social  
Protection in China”**  
**March 2020-December 2021**

**1. Justification**

Existing policy and regulations in China provide for universal pensions and medical care. However, there persist barriers for workers in non-standard employment to access social insurance, resulting in more restricted access and lower benefits than those available for standard employees.

The EU-CHINA Project on “Improving China’s Institutional Capacity towards Universal Social Protection” is a partnership between the Ministry of Human Resources and Social Security and the International Labour Office in Beijing with funding by the European Union. The project aims to contribute to the improvement of the adequacy and sustainability of old-age benefits and to contribute to the extension of the coverage of social security to workers in non-standard forms of employment (NSFE), with a special attention to migrant workers and women.

Under this project, a number of activities are foreseen to strengthen the capacity of ILO constituents to improve China’s social protection system, in support of the realisation of international standards. Increased access to and dissemination of information and knowledge about good practices on regulations and operations, pertaining internationally and domestically in China, will contribute to improve and streamline measures to strengthen social security of workers in NSFE. This can be facilitated by use of various media.

Based on existing research, policy briefs accompanied by Podcasts or video casts help disseminate existing findings from a wide net of collaborators to help practitioners and wider research communities deepen their understanding of the challenges and opportunities for improvements in regulations and operations.

**2. Objective**

Producing Policy Briefs and Pod Cast Series will strengthen the knowledge of government officials and ILO constituents to make evidence-based and informed decisions on rights-based social security policy and implementation.

**3. Contents**

The Policy Brief and Pod Cast Series will provide qualitative and quantitative evidence based on existing research on policies and administration:

- Contributing to better mapping and measuring different categories of workers:

According to the ILO, non-standard forms of employment include all forms of work that are not full-time and open-ended. Non-standard forms of employment include for example temporary **employment**; part-time and on-call **work**; temporary agency **work** and other multiparty **employment** relationships; as well as disguised **employment** and dependent self-**employment**.

**Non-standard employment** features prominently in crowdwork and the gig economy

- Workers working through platforms can fall in the following categories:
  - 1) They have an employment contract with the platform. This employment contract can be full-time or part-time, or it can be open-ended or temporary.
  - 2) Workers have an employment contract with the client – In this case, the platform is just an intermediary. Here again the contract can be standard or non-standard.
  - 3) Workers are contracted by an agency to work for a platform. In this case, the workers have an employment relationship with the agency – In most cases the relationship is short term in nature.
  - 4) Workers are genuine self-employed and use the platform to get clients – In this case, workers have no contract, nor with the platform nor with an agency nor with the client. The work being performed and the way it is performed are defined as self-employment by national laws and regulations.
  - 5) Workers are in a disguised employment relationship. In this case, the workers have no employment contract with any entity but according to national laws and regulations, the work being performed and the way it perform correspond to dependent work – Criteria could include for example, the level of supervision the platform uses on the workers.
  - 6) The workers' status is unclear according to national laws and definition. The workers have no employment contract but national laws and regulations do not provide sufficient elements to determine the existence of an employment relation or self-employment. This could be the grey zone.
- Rural – urban migrant work

Papers would update the evidence on access of these different categories of workers to different branches of social insurance, classified by provinces/city, sector, gender and origin (Hukou) of workers.

The Policy Brief and Pod Cast Series can also address the following issues:

- Better understanding of underlying risks and needs, aspirations and ability of workers in NSFE, particularly workers in platform industries, to participate in public social protection

- Circumstances faced by workers with multiple jobs concurrently or sequentially, and problems of portability of rights in the course of acquisition across jobs and provinces/and cities
- Circumstances of women at work:
  - employed casually (very short working hours, piece or task work)
  - in part time
  - temporary jobs
  - multiple jobs
  - in the platform economy

The Policy Brief and Pod Cast Series should show the relation to the effect on benefits of intermittent, irregular work and low pay in their social security contributions. Attention to the double burden of family care and work and its social security treatment should be highlighted.

- Identifying and demonstrating new national or provincial/city legal and regulatory public measures to help workers in NSFE access social insurance. These involve:
  - Interpretations and applications of labour or social security legal status (or both if they differ) of self-employed workers in platform industries
  - New city or provincial fund regulations or pilot experiences to include workers in NSFE and/or migrant workers in employee schemes
  - Relations between social assistance as relevant, basic resident pension and medical schemes, and employees' social insurance schemes
  - Aspects of complementarity and portability of benefits or their absence
- Regarding the effects of existing and potential models of contributions paid by workers in NSFE:
  - Provincial or local changes in contributions rates and their effects on employment, on participation in social insurance schemes
  - Investigating the appropriateness of contribution rates to workers in NSFE, as a percentage of the non-wage labour costs, comparing costs for given packages of benefits for non-standard workers with same packages for standard workers
  - Comparison of benefits between workers in NSFE and standard workers
- Demonstrating better practices in governance and administration of social security administration
  - Mapping of institutional processes and recommendations for improving oversight mechanisms to increase transparency and social security management accountability
  - Shortcomings to the governance and administration of social insurance and solutions to remedy those to increase rights based social security provision
  - Demonstrating better integration and coordination of management information systems, service delivery and customer interface

- Enhancing interoperability of data and information for increased portability of rights in the course of acquisition
- Documenting innovative contribution collection systems
- Achieving wider social security fund pooling at provincial level
- Use of smart government involving use of digital technologies to enhance user centric, cost effective social insurance delivery
- Developing effective and innovative outreach services and communication campaigns to non-standard workers
- Showcasing mechanisms for participation of stakeholders, notably social partners and representatives of protected persons in the oversight and or management of social security
- Functioning of national or local grievance processes

The project is also interested in collecting narratives of personal life stories of workers in non-standard employment, both depicting the importance of social security and the impact of the absence of social security in their lives. These could be in documentations or audio-visual recording. They could exemplify or illustrate the real personal, social and economic impact of social security.

The Policy Brief and Pod Cast Series should focus mostly Chinese experiences with a limited number of international experiences.

#### **4. Methodology**

Briefs are up to a limit of 2,500 words (a maximum of 4.5 pages, Arial font, 1.5 lines including tables, graphs and illustrations excluding bibliography). They may be in addition be accompanied by graphs, tables, photos or other illustrations. Briefs synthesize findings of a new study or publication, sum up findings of different studies on a topic of interest, or bring light to a new practice or measure. Hyperlinks may be included. A bibliographical section will be provided. They may be written in Chinese or English and will be translated in the other language. Authors may be asked for an interview and a 30/40 minutes Pod cast in video or audio presenting the main results.

#### **5. Expertise, selection and notification**

##### Eligibility

Eligible candidates for this call for proposals may be qualified individuals, institutions, or non-governmental organizations registered as not-for-profit organizations in China or in an EU country. Qualified candidates (individuals or institutions) must be able to demonstrate having the following qualifications, experience and competencies:

- Advanced degree in economics, law or other social sciences, specialization in social security policy or administration preferred
- Experience in undertaking national comparative studies in social security policy and administration

- Experience in developing and applying empirical methods including survey questionnaires and conducting semi-structured interviews
- Ability to analyse a variety of subject matters with an understanding of the interrelationships between the subject(s) under review and the existing legislation and practice.
- Demonstrated experience of work in the field in China;
- Proven track record of drafting clearly and concisely;
- Command of English preferred

### Selection

A limited number of proposals will be selected for publication after each submission date, approximately five per year for a period of three years, after consideration by a selection committee of the EU China Project on “Improving China’s institutional capacity for universal social protection”.

The project will notify and contract the authors who are selected.

Some experiences may be selected for presentation at an annual Conference and other events in the scope of the project.



Funded by the European Union

(中译稿供参考，以英文本为准)

## 中欧“提升中国社保经办服务能力，实现全民社会保障”项目 关于制作“加强中国全民社会保护能力”的政策简报、播客和相关 宣传品的意向书

### 1. 背景

中国现有政策和监管环境已基本实现了全民养老和医疗保险覆盖。但是，非标就业人员仍然难以参加社会保险。与标准雇员相比，他们参保限制更多、待遇更低。

欧盟-中国“提升中国社保经办服务能力，实现全民社会保障”项目由人社部和国际劳工组织北京局共同合作实施，由欧盟提供资金支持。该项目旨在促进改善养老待遇充分性和可持续性，扩大社会保障覆盖面，将非标就业人员特别是农民工和女工纳入社保体系。

为推动国际标准实现，项目实施过程中将开展一系列活动，增强中国社保经办服务能力。获得越来越多的有关中国国内和国际相关政策、良好经验做法的信息和知识，有助于传播、完善、优化相关举措，保障非标就业人员权益。不同媒体形式可促进这一目标实现。

政策简报及配套的播客或视频以现有研究为基础，在网络中更加广泛地传播现有发现，帮助从业人员和研究群体加深对完善政策和经办操作所面临的的机遇和挑战的理解。

### 2. 目标

政策简报和播客系列旨在为中国政府和国际劳工组织三方成员提供相关知识，以便做出有据可依的决策，助力社会保障政策出台和实施。

### 3. 内容

政策简报和播客系列将展示定性和定量证明以及相关政策和行政措施的研究：

有助于更好地衡量和区分以下内容之间的重叠区间：

- 非标准就业：涵盖所有临时、兼职和自雇工作，即所有偏离单一雇主的、全职的、大众化的“标准”就业，包括“传统的”兼职、临时工作以及“新形式”的工作。
- “新就业形态” 包括：
  - **平台就业**：（即由将客户与提供服务的员工匹配通过应用或网站进行的交易）；
  - **临时合同**：期限较短临时合同，没有保障和/或不可预测的工作时间的合同（随时待命）；
  - **自有账户工作**：较为普通的自有账户工作（即无雇员的自雇人员），包括为一个或多个客户工作，尤其是通过新的劳动力市场中介服务（劳动中介）。
- 农民工

简报应更新上述不同劳动者参加社会保险的现行证明，并按照省市、性别、户籍进行分类。

其他简报内容：

- 有助于更好地了解非标就业人员的社会风险、需求、愿望和参加公共社会保险能力，特别是平台就业人员。
- 针对同时或连续从事多个工作的劳动者，以及在跨工作、省、市工作中面临的社保转移接续问题。
- 针对女工的工作情况：
  - 随意工作（非常短的工作时间和非常少的工作任务）
  - 兼职

- 临时工作
- 多个工作
- 平台经济工作

简报应在缴费情况中说明间歇性、不定期工作和低薪对待遇的影响。应强调家庭和工作带来的双重负担及其社会保障待遇。

- 确定并展示国家或各省市新出台的幫助非标就业人员参加社会保险的相关法律法规和公共措施，涉及：
  - 平台行业的自雇人员（无工人）的劳动或社会保障法律地位的相关解释和适用。
  - 各省市新出台的社保基金相关法律法规或试点经验，将非标就业人员和/或农民工纳入职工保险。
  - 相关社会救助制度与基本居民养老保险和医疗保险、职工保险之间的关系。
  - 涉及待遇的互补性、可移植性和不充足性。
- 涉及非标就业人员现行及可能采纳的缴费模式所产生的影响
  - 社保费率变化及其对就业和参保的影响。
  - 调查非标就业人员相关缴费占其非工资劳动成本的百分比，将其获得待遇成本同标准就业人员获得待遇成本进行比较。
  - 比较非标就业人员待遇与标准就业人员待遇。
- 展示在社会保障管理方面更好的做法
  - 制定程序和建议，改善监督机制，提高透明性，压实社保管理责任
  - 社会保险管理方面的缺陷和解决方案，保障相关人员社保权益
  - 展示更好的综合协调信息管理系统、服务交付和客户使用界面
  - 增强数据和信息的互操作性，提高社保权益可携带性

- 创新缴费记录系统
- 提高省级社保基金统筹能力
- 利用智能政务系统包括数字技术，增强以用户为中心具有成本效益的社保服务交付
- 为非标就业人员开展有效和创新的展示服务和宣传活动
- 展示利益相关者特别是社会伙伴和参保人员代表参与的社会保障监督和管理机制
- 国家或地方申诉程序流程

此外，本项目有意向收集非标就业人员个人生活经历叙述，既描述了社会保障的重要性，又说明了缺乏社会保障对其生活的影响。可以是书面内容也可以是音频视频文件，举例说明社会保障对个人、社会和经济的实际影响。

将主要选取展示中国经验内容，少量选取国际经验。

#### **4. 方法**

简报最多不超过 2500 个字（最多 4.5 页，Arial 字体，1.5 行行距，包括表格，图表和插图，不包括参考书目）。简报可附有图表、表格、照片或其他插图。简报可对一项新研究或出版物的发现进行综述，总结有关主题的不同研究发现，或阐明一种新的实践或方法。可提供超链接和参考书目。可用英文或中文撰写，文本将被译成双语。可能会对此采访作者，并在 30-40 分钟的播客中以视频或音频形式播报主要研究结果。

#### **5. 提交方案、遴选和通知**

申请人需提交技术方案（中文或英文）以及一份详细的财务方案。

中文或英文技术方案不超过两页，注明：

- 作者姓名和职务
- 作者简历
- 所属工作机构/研究机构/政府部门

- 简报所基于的研究初始日期，是否发表以及以何种形式发表
- 简报方案包括：
  - 300 字摘要/研究主要成果概述
  - 简报篇幅建议（字数）
  - 主要研究方法

详细的财务方案应阐明工作日数量，人日费用以及其他相关费用。技术和财务方案应分别发送给国际劳工组织，并在邮件标题中明确注明。

### 资质

申请人可以为具备资质的个人、机构或在中国或欧盟注册的非政府组织。

- 取得经济、法律或其他社会科学领域的高等学历，社保政策或社保管理领域的专业优先
- 具备在社保政策和管理方面从事比较研究的经验
- 具备采用实证方法开展研究的经验
- 有能力分析不同主题，并充分理解相关主题的立法及实践
- 具备在中国社保领域工作的经验
- 写作简洁明了
- 熟练掌握英语者优先

### 申请日期

申请分阶段进行：2020 年和 2021 年的 3 月 20 日，6 月 20 日，9 月 20 日和 12 月 20 日。最后一次申请日期为 2021 年 12 月 20 日。

### 申请提交

申请应提交至 [frotal@ilo.org](mailto:frotal@ilo.org)，并标注“中欧社保项目：政策简报——技术方案”及“中欧社保项目：政策简报——财务方案”。

## 遴选

经过欧盟-中国“提升中国社保经办服务能力，实现全民社会保障”项目评选委员会审议，将选择出版有限数量的简报（每年约五份，为期三年）。

项目将通知中选作者，并进行签约。

项目范围内，可选择一些简报内容在年度会议上和其他活动中进行介绍。



本项目由欧盟资助