



EU-China Project

“Improving China’s institutional capacity towards universal social protection”

Call for expressions of interest:

Technical note on “Effects of digitalization on human centricity of social security administration and services”

The ILO Country Office for China and Mongolia is seeking a qualified individual or institution to develop a technical note on “**Effects of digitalization on human centricity of social security administration and services**”. 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.

Applicants 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 the technical note including
 - 300-word summary of the evidence or research findings
 - 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. The submission must be marked: “China EU Social Protection Project: Technical note – Technical Proposal” and “China EU Social Protection Project: Technical note – Financial Proposal.”

Submissions should be sent no later than 21 November 2021. The ILO will inform the applicants of the selection results no later than 30 November 2021. Work should start no later than 15 December 2021.



Funded by the European Union



Terms of Reference

Development of a technical note on “Effects of digitalization on human centricity of social security administration and services”

December 2021-March 2022

1. Background

The rapid development of modern information technology characterized by digitization, cloud computing and networking, automation, machine learning and artificial intelligence, data filing systems including block chain technology, and Big Data, have promoted the rise of digital economy and network society. This has brought profound changes to the economic and social development in various countries, and significant changes to people’s lifestyle. At the same time, fast paced demographic, social and technological changes, combined with economic and financial constraints put social security administrations under strong pressure to deliver reliable and cost-effective services.

Despite the growing reach of social security services, many users still face considerable number of hurdles in accessing needed protection. Many people in rural areas need to travel long distances to register in person, and to benefit from social security. In many cases, the processes require an excessive number of interactions with multiple services which impose a high cost on users. This deters many from registering and enjoying benefits. In addition, social security is often unable to deliver timely personalised support services and solutions to a more diverse workforce, constituted by internal and international migrants with different labour market situations.

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 (MOHRSS) and the ILO Country Office for China and Mongolia with funding by the European Union. The project currently is undertaking a study on **digital transformation of social insurance administration and services in China**, which aims to provide recommendations for a national social insurance digital transformation strategy and data governance plan.

To contribute to this research, this call for expressions of interest seeks to identify one consultant or institution to develop a technical note on “**Effects of digitalization on human centricity of social security administration and services**”.

2. Objective

To collect international evidence of human-centered digital social security administration and services (no geographic restriction), to produce one technical note, and to present the main findings in a webinar on the topic. The webinar contents will be edited into a podcast and published online.



3. Contents

The themes will be based on practical cases from existing literature and may include the following:

- (1) Use of automated systems for benefit eligibility and proactive delivery of social security benefits. Consider the benefits of these processes for enterprises, workers and administrations and their potential for inclusion or exclusion of services.
- (2) Implications of massive collection of (personal) data and their transfer between administrations for better decision making. Consider the benefits and risks of customer profiling, notably in terms of bias and discrimination.
- (3) Consider aspects of protection of data and safeguard of the right to privacy.
- (4) Impact of technologies on empathy in offline human interface and multi-channel delivery systems.
- (5) Impact of multi-channel delivery on access to services of vulnerable and digital illiterate groups and strategies to overcome the hurdles and risks of exclusion.
- (6) Impact of call centres and chat bots and other information processes on speed and accuracy of information and consideration of complexity of cases.
- (7) Evidence of increased or decreased investment in guidance and orientation and case management.
- (8) Existence of expedite and costless complaints, appeals and redress mechanisms for digital technologies-based errors and fraud
- (9) Digital solutions and workplace organisation: to what extent digital solutions increase work specialisation and narrow task definition (such as in call centres and controllers), or instead wider job content, lateral thinking and collaboration?
- (10) Impact of digital technologies on skills necessary for social security. Do digital social security organisations require data processing operators with basic digital skills, or higher digital skills involving critical thinking¹, problem solving, creativity?
- (11) Leadership and project management and data governance skills.
- (12) Relation of the topics with European and UN international standards

¹ Skills to contextualise information in relation to the business environment and people's circumstances



4. Methodology

The technical note is up to **a limit of 10,000 words** (a maximum of 20 pages, Calibri 12, 1.5 lines including tables, graphs and illustrations excluding bibliography). They may be in addition be accompanied by graphs, tables, photos or other illustrations.

The note synthesizes findings of a new study(studies) or publication(s), sums up findings of different studies, or bring light to new practices or measures. Hyperlinks may be included. A bibliographical section will be provided.

They may be written in Chinese or English. The ILO will translate it in the other language.

The author(s) will be asked to present main findings at a webinar (up to 30 minutes in a 2-hour webinar) and the contents will be produced into a podcast and published online.

5. Expertise, application and selection of applicants

Eligibility

Eligible applicants for this call may be qualified individuals, institutions, or nongovernmental organizations registered as not-for-profit organizations.

Qualifications, experience and competencies

- Advanced degree in data science, public administration, economics, law or relevant social sciences
- Proven record in the field of research and technical assistance in the field of digital transformation in public administration
- Knowledge of the field of social insurance policy and administration preferred
- Experience in developing and applying empirical methods
- 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/related to China preferred
- Proven track record of drafting clearly and concisely
- Command of English preferred

Evaluation criteria

Selection of applicants will be based on the following criteria:

- Technical capacity including specific areas of technical expertise
- Level of relevance and depth of actual technical experience
- Clarity and soundness of proposed research methodologies and approaches
- Readiness of taking assignment and appropriate timeline
- Language: proficiency in English would be a value added



- Cost proposal

Final weighting: technical proposal 70% and financial proposal 30%.

※ **Only the applicants that pass the technical proposal (at least 60%) will see their financial proposal assessed.**



(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

撰写“数字化对以人为本的社会保障管理和服务的的影响”技术报告

招标意向书

国际劳工组织中国和蒙古局正在寻找国内外符合资质的个人或机构撰写“数字化对以人为本的社会保障管理和服务的的影响”技术报告，作为中欧“[提升中国社保经办服务能力，实现全民社会保障](#)”项目下的一项工作任务。

更多详细信息请参考下页任务大纲。对本课题有意向的申请人，请提交中文或英文技术方案和一份具体的预算方案，详细要求如下：

1. 中文或英文**技术方案**（不超过 2 页）：
 - 作者姓名、工作单位及职务
 - 作者简历
 - 报告基于哪些现有研究，研究完成日期，是否发表以及以何种形式发表
 - 拟撰写技术报告的方案：
 - 300 字摘要/研究主要成果概述
 - 主要研究方法
2. 详细的**预算方案**应阐明工作日数量，人日费用以及其他相关费用。

技术方案和预算方案应分别通过邮件发送至 frotal@ilo.org，并在邮件标题中明确注明“中欧社保项目技术报告——技术方案”和“中欧社保项目技术报告——预算方案”。

申请材料不晚于 2021 年 11 月 21 日提交。国际劳工组织将在 2021 年 11 月 30 日之前将遴选结果通知给申请人。撰写工作不晚于 2021 年 12 月 15 日开始。



本项目由欧盟资助



撰写“数字化对以人为本的社会保障管理和服务的影响”技术报告

2021年12月-2022年3月

任务大纲

1. 研究背景

以数字化、云计算与云网络、自动化、机器学习和人工智能、数据归档系统（包括区块链和大数据）为特征的现代信息技术高速发展，推动了数字经济和网络社会的蓬勃崛起；各国经济、社会和政治发展面临深刻变化，人们生产和生活方式发生重大变革。但面对人口结构、社会与技术的快速改变以及经济和财政制约，社保经办机构在提供高效可靠的服务方面面临巨大压力。

尽管社会保障服务不断拓展，许多用户在获取保障服务时依然面临诸多障碍。农村地区人口时常需长途跋涉亲自办理登记和待遇领取手续。许多情况下，办理流程需要不断与相关部门打交道，申请人需为此支付高额成本，导致大量人员在参保登记和待遇领取过程中遇到诸多不便。此外，劳动力市场状况的差异使得国内外流动构成的劳动力人口更加多元，这些新兴工作环境与过去稳定高效提供社会保障服务的标准雇佣关系极为不同，因此社会保障往往无法及时为这类群体提供个性化支持服务和解决办法。

欧盟-中国“提升中国社保经办服务能力，实现全民社会保障”项目由中国人力资源和社会保障部与国际劳工组织北京局共同合作实施，由欧盟提供资金支持。项目目前正在进行一项**关于中国社会保险管理和服务数字化转型**的研究，旨在为国家社会保险数字化转型战略和数据治理方案提供建议。

为了更好地支持这项研究，本招标意向书旨在寻找符合资质的顾问或机构，撰写“**数字化对以人为本的社会保障管理和服务的影响**”技术报告。

2. 研究目标

撰写一份技术报告，收集以人为本的数字化社会保障管理和服务的国际经验（无地域要求），并在有关该主题的网络研讨会中介绍主要发现。网络研讨会内容将被编辑成播客并在线发布。



3. 内容

技术报告应基于现有研究成果中包含的实践案例，可以包括以下主题：

- (1) 使用自动化系统进行待遇资格审定和社保待遇主动发放。考虑系统对企业、劳动者和行政部门的影响，以及系统的引入是否可能包含或排除了某些服务。
- (2) 大量收集（个人）数据，及其在不同行政部门之间转移交换对提升决策的影响。考虑客户信息分析使用的好处和风险，特别是在偏见和歧视方面。
- (3) 考虑数据保护和隐私权保护。
- (4) 技术对线下服务的同理心和多渠道服务交付系统的影响。
- (5) 多渠道服务交付对弱势群体及数字技能程度较低群体获取服务的影响，以及如何克服这些障碍和排斥风险的策略。
- (6) 呼叫中心和聊天机器人等信息处理对处理速度和信息准确性的影响以及对案件复杂性的考虑。
- (7) 在客户引导以及个案管理方面增加或减少投入。
- (8) 针对基于数字技术的错误和欺诈的快速且无成本的投诉、申诉和补救机制
- (9) 数字化解决方案和工作组织：在多大程度上数字化方案增加了工作专业化并缩小了任务范围（如呼叫中心和管理员），还是促进了更宽泛的工作内容、横向思维和协作？
- (10) 数字技术对社会保障所需技能的影响。数字化社会保障工作需要具有基本数字技能的数据处理操作员，还是需要他们具备涉及批判性思维²、解决问题、创造力等更高层面的能力？
- (11) 领导力、项目管理和数据治理技能。
- (12) 该主题有关的欧盟和联合国国际标准。

4. 方法

技术报告**不超过 10,000 字**（最多 20 页，英文 Calibri 字体 12 号，1.5 倍行距，中文雅黑字体 11 号，1.5 倍行距，包括表格、图表和插图，不包括参考书目）。可附有图表、表格、照片、插图等。

报告可对一项或多项新研究或出版物的发现进行综述，总结在相关主题上的研究发现，或介绍新的实践或方法。可提供超链接和参考书目。

² 将信息与业务环境和个体的具体情况相关联的技能



报告可用中文或英文撰写。国际劳工组织将制作中英双语报告。

作者需要在网络研讨会上（约两小时）介绍研究成果（约 30 分钟），研讨会内容将被做成播客并在网络上发布。

5. 资质、申请及遴选

申请资质

申请人可以为具备资质的个人、机构或注册的非政府组织。

资历、经验及能力要求

- 取得数据科学、公共管理、经济、法律或其他社会科学领域的高等学历
- 在公共管理数字转型方面有可靠经验
- 具备在社保政策和管理方面知识的申请人优先考虑
- 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
- 具备与中国相关的工作经验者优先考虑
- 写作简洁明了
- 英语熟练者优先

评定标准

- 技术能力，包括在特定领域的技术专长
- 实际技术经验的关联度和深度
- 提出的研究方法的清晰度和完整性
- 是否能立即开展工作及时间安排
- 语言：精通英语者将优先考虑
- 预算方案

权重：技术方案 70%，预算方案 30%。

注意：只有技术方案通过评审（不低于技术满分值的 60%）的申请人，方可进入预算方案的评审。