

**Call for tenders for subcontracting an expert for IndustriAll and Syndex joint project “EU Defence policy: towards more industrial integration. How to anticipate change for workers?”**

This is a call for a subcontractor to provide expertise as part of the implementation of IndustriAll and Syndex joint project entitled “EU Defence policy: towards more industrial integration. How to anticipate change for workers?”

### **1. Background information on the project**

Military cooperation in the EU will be extended and further developed in the coming years. In the field of military equipment, the EU Member States are increasingly focusing on the creation of a transnational armaments industrial base through integrated procurement processes, common projects, cooperation and the merger of large companies.

The strategic goal is to establish a joint European Defence Technological and Industrial Base (EDTIB). This vision is a fundamental assumption of the European Security and Defence Policy. Foreign and Defence ministers from 23 EU member states signed a landmark decision in November 2017 to jointly develop arms projects and advance the military integration of their armies.

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**The objectives and expected outcomes of the project are:**

*Strengthening social dialogue and workers participation at various level regarding anticipating and shaping the change brought by the integration, at the scale of the European Union, of defence procurement.*

- By the exchange of practices and experiences of information, consultation as well as workers involvement and participation in policies at national, sectoral as well as company level, the project will contribute to a balanced approach of managing change following the integration, at the scale of the European Union, of defence procurement.
- The project will foster social dialogue and mutual learning in the defence industry, strengthen active participation of workers representatives, (company-based) trade union bodies and European Works Councils in consultation and information mechanisms on company level.
- In this context, the project shall also support initiatives or initiate transnational initiatives within multinational companies and EWC structures.
- Where possible, the creation of new EWCs will be initiated
- The project will support European and national trade unions to enter or enrich the social and tripartite dialogue, with company management and with arms procurement bodies of European Union Member States, on defence, industry and employment related issues.

*Definition of common positions and concrete approaches with particular view on the defence industry*

- One kick off desk research on EU policies, five sub-sectoral reports and one final overview study on the social consequences of the integration of Defence procurement at EU level
- Recommendations to trade unionists and workers' representatives in European and national Works Councils, and more generally to all bodies involved with Information & Consultation rights of workers, to shape the integration of Defence procurement at EU level.
- Declaration on a "fair integration of Defence procurement at EU level"

The project will involve in priority companies and workers' representatives / trade unions from the following six target Member States of the European Union: France, Germany, Italy, Poland, Spain, Sweden.

The sharing of experience among trade unionists and workers' representatives in the Defence sector will be performed in a range of workshops and a final conference.

The questions that the workshops will attempt to answer are the following:

- *Are workers representation organisation and bodies equipped sufficiently to anticipate and shape the change that is triggered by the integration of Defence procurement at EU level? What does this mean for the anticipation and management of change, in particular by EWCS, and Information & Consultation bodies?*
- *Which solutions and practical experiences exist already to shape a fair integration of Defence procurement at EU level and which solutions should be advocated at the transnational and European level?*
- *What opportunities exist to influence company decision through information and consultation as well as board-level representation? What differences exist at national level in anticipating and managing change at company level and beyond?*

## **2. Tasks to be performed by the subcontractor**

The subcontractor shall conduct a kick-off research and research on the following defence industry sub-sectors: Aeronautics, space & missiles and land systems.

The research will be based on:

- A kick-off report to frame the project and clearly identify current and future trends in the industry
- Desk research for each concerned sub-sector, on the basis of public information (academic, specialised media, public authorities' declarations, companies' official publications) and on the information detained by the co-applicant and associated organisations
- A survey of workers representatives in the sub-sectors, on the basis of questionnaires to be sent to the contractor networks in the six target countries covered
- A summary of all sub-sectors studies and an analysis of commonalities and differences between sub-sectors to provide an overview of the general trends in Europe.
- Support drafting the final declaration

The study will identify risks and challenges, as well as opportunities, that are resulting from the integration of Defence procurement at EU level. This study will consider (1) the labour market, and (2) qualifications and skills development.

- EU state of play and general introduction to kick-off meeting: to be drafted jointly with the contractor (Syndex)

- Sub-sectors to be covered by Syndex: (1) naval shipbuilding and (2) command, control, communications & intelligence systems.
- Sub-sectors to be covered by an external expert: (1) aeronautics, space & missiles, (2) land systems.
- Each sub-sector study will cover the defence sector value chains.
- General overview and conclusions: to be drafted jointly with the contractor

The subcontractor will be part of the steering group composed of:

- one representative of Syndex
- one representative of industriAll Europe secretariat
- one representative from each of the 6 target Member States of the European Union, each to be chosen by the project partners from that Member State.

Four steering group meetings will be held in Brussels.

The subcontractor will participate to the workshops and final conference.

### 3. Expertise, experience and skills required

**Sound expertise is required on the following issues:**

- o Expert knowledge of subcontracting practices and of the regulation of subcontracting at national and European level;
- o Expert knowledge of labour law and company law and EU internal market policies;
- o Expert knowledge of the defence industry and the following sub-sectors: Aeronautics, space & missiles and land systems.
- o Good understanding of industrial relations (both in national and European contexts);
- o Experience in working on European level projects;
- o Good understanding of the European trade union movement.

**Sound experience is required in the following areas:**

- o Carrying out in-depth researches, including legal researches and overviews, preferably relating to workers' rights, working conditions and employment contracts;
- o Writing research reports containing analysis of legal frameworks and meaningful policy recommendations;
- o Successful track record of delivering studies and reports for similar projects, with EU institutions and/or European stakeholders (social partners, NGOs, etc.).

**Skills required:**

- o Proven research and presentation skills (in English);
- o Proven skills in drafting study reports;
- o Ability to work within specified deadlines and to respect budgetary limits;
- o Ability to work in a multicultural context and understanding of different industrial relations culture & traditions;
- o Good administration and project management skills.

## 4. Time schedule and reporting

The subcontractor will be asked to perform the above-mentioned tasks by the end of January 2022. The subcontractor will also be asked to participate in the next events of the project.

## 5. Budget and payments

Total budget for the Expertise is amounted to 38.500 euros (VAT and all taxes included)

The subcontractor will be remunerated in various instalments (advance and final payment).

This amount covers the fees but does not include the travel and subsistence costs incurred for attending project meetings (such as Steering Committee meetings and workshops). These will be covered by Syndex on the basis of EU rules & thresholds.

## 6. Selection criteria

The selection criteria are:

- Verifiable expertise, experience and skills, as required and described in part 3 of this call;
- Proven track record of ensuring the quality of written materials produced, both in terms of content and format (i.e. previous publications), in the relevant subjects specified in this call for tenders;
- Price not exceeding the amount stated above;
- Previous research/work undertaken in the field of subcontracting and its impact on employment and labour.

## 7. Form, structure and content of the tender

Tenders must be written in English. They must be signed by the tenderer or his duly authorised representative and be perfectly legible so that there can be no doubt as to words and figures. Tenders must be clear and concise and assembled in a coherent fashion.

Since tenderers will be judged on the content of their written bids, they must make it clear that they are able to meet the requirements of the specifications.

All tenders must include at least two sections:

### I. Technical proposal

The technical proposal must provide all the information needed for the purpose of awarding the contract, including:

- Specific information covering the technical and professional capacity, as required, in particular:
- Description of relevant professional experience with emphasis on the specific fields covered by the invitation to tender;
- Detailed curriculum vitae of key coordinator and of the other team members;
- A selection of the main works and/or articles published by all the experts involved, in relation to the relevant subjects specified in this tender.

- Specific information concerning the proposed methodology for delivering the tasks listed in part 2 of this call.

## II. Financial proposal

Prices of the financial proposal must be quoted in euros, including if the subcontractor is based in a country which is not in the euro-area. As far as the tenderers of those countries are concerned, they cannot change the amount of the bid because of the evolution of the exchange rate. The tenderers choose the exchange rate and assume all risks or opportunities relating to the rate fluctuation.

Prices must be fixed amounts and shall not include travel expenses and daily allowances for the attendance to the Steering Committee meetings and other project events which will be covered by the contractor on the basis of EU rules & thresholds.

The maximum amount available for this contract is EUR 38.500 (VAT and all taxes included). Prices shall be fixed and not subject to revision during the performance of the contract.

## 8. Award Criteria

The contract will be awarded to the tender offering the best value for money, taking into account the specific objectives, requirements and selection criteria of the tender. The principles of transparency and equal treatment will be respected with a view to avoiding any conflicts of interest.

## 9. Content and selection of the bids

This call for tenders will be published on the Syndex and IndustriAll Europe websites and will be kept online for 20 calendar days. Offers must be sent in electronic format by e-mail to [s.ikolo@syndex.eu](mailto:s.ikolo@syndex.eu) on **1 June 2020 at the latest**.

Syndex will confirm the date and time of receipt of each bid.

The committee will evaluate the tenders that have been deemed admissible and will select one offer on the basis of the criteria listed above.

One member of the steering committee will confirm the date and time of receipt of each bid. The steering committee members will sign the report on the bids received, which will list the admissible bids and provide reasons for rejecting bids owing to their failure to comply with the stipulations of the tendering process.

The committee will also evaluate the tenders that have been deemed admissible. An evaluation report and classification of participation requests will be drawn up, dated and signed by all the members of the evaluation committee and kept for future reference.

This report will include:

1. The name and address of the contracting authority, the purpose and value of the contract;
2. The names of any excluded candidates and the reasons for their rejection;
3. The names of candidates selected for consideration and the justification for their selection;
4. The names of candidates put forward and justification of their choice in terms of the selection or award criteria.