

October 8, 2021

## **Call for Proposals**

### ***Study on the Transformation of the Global Automotive Industry***

The Rosa-Luxemburg-Stiftung (the “Client”) intends to award the services specified in the enclosed Service Description in a Call for Proposals.

**Please note the following dates:**

**End of the tender submission period:** 15.10.2021 12:00 o'clock Central European Time

**End of the award and binding period:** 22.10.2021

**Contract period:** 01/11/2021-30/04/2022

**Terms and conditions:**

The contractual conditions of the Client shall apply exclusively. The terms and conditions of the tenderer are excluded. Side offers are excluded!

The present Call for Proposals shall not be construed as an offer, and the bidder shall not have any rights arising thereof.

To participate in the Call, please submit your Application digitally before the end of the offer period. Documents can be submitted in English, German or French language.

With kind regards

Jan Leidecker, Head of RLS Geneva Office

**Annexes:**

1. Terms of reference
2. Conditions of participation
3. Price sheet
4. Standard tender form
5. Self-declaration form
6. Self-declaration on rate loyalty, minimum wage, and social security contributions
7. Qualified references form

## *Annex 1: Terms of reference*

### **Awarding of a service agreement for: *Study on the Transformation of the Global Automotive Industry***

#### **1.1. About Rosa-Luxemburg-Stiftung**

Rosa-Luxemburg-Stiftung e.V. (RLS) is one of the six major political foundations in the Federal Republic of Germany, tasked primarily with conducting political education both at home and abroad. The Stiftung's work adheres to the legacy of its namesake, German socialist leader Rosa Luxemburg, and seeks to represent democratic socialism with an unwavering internationalist focus. The Stiftung is committed to a radical perspective emphasizing public awareness, enlightenment and social critique. It stands in the tradition of the workers' and women's movements, as well as anti-fascism and anti-racism. Rosa-Luxemburg-Stiftung e.V. is a registered non-profit organization in Germany. The Stiftung is closely linked to Die Linke, the German Left Party.

The aim of the work of Rosa-Luxemburg-Stiftung is to promote a critical analysis of society and foster networks of emancipatory political, social and cultural initiatives around Germany. Internationally, it will participate in cooperative development projects and advocate for a dialogue between the Global North and South conducted on equal footing. Like other political foundations, Rosa-Luxemburg-Stiftung seeks to develop and expand the concept of political education by emphasizing a critical analysis of society as our central task, further underlined by our namesake.

Based on the firm belief that social change requires a reflective confrontation with today's capitalist society as a whole, the Rosa-Luxemburg-Stiftung strives to develop alternative concepts and approaches for a comprehensive process of social transformation enabling the creation of a more united and just society. Education and training in democratic socialist politics, analysis, information and policy advice are therefore the Rosa-Luxemburg-Stiftung's basic tasks.

#### **1.2. Background**

The Geneva office of Rosa-Luxemburg-Stiftung was founded in 2019. It serves as the liaison office to the UN institutions in Geneva, but as well works thematically towards the issues of global social rights, socio-ecological transformation and transnational organizing.

This Call for Proposals for a Service contract on the Study on the Transformation of the Global Automotive Industry is being published in the context of RLS Geneva office aiming to initiate its thematic work on international trade union politics, just transition and the global supply chain.

#### **1.3. Aim of the service**

The RLS Geneva office is looking for a consultant for a six-month project on the transformation of the auto industry in the context of the global transition to a net-zero economy. Driven by new climate commitments and a vision of the future without combustible engines, car manufacturers are initiating, and participating in, large-scale transformative changes in global supply chains by shifting their focus on electric vehicles and battery production. Given the importance of the German car giants, the report must focus on the German manufacturers and their supply chains, thus the consultant is expected to have an intimate understanding of the German auto-industry and the role of IG Metall.

The project acts as a baseline study for the RLS Geneva office to establish a fundamental understanding of the broader transition of the global economy from the perspective of the auto

industry, a case study focused on a single manufacturer, and a mapping exercise of potential progressive partners pursuing a fundamentally just transition at the international level.

This project will act as a starting point for the office's work on the automotive industry, supply chains and just transition as core pillars of our thematic approach to international trade union politics. The outputs to be produced by this project will inform the future work of the office on these issues, in tandem with other currently on-going parallel projects. Approaching these issues from a left perspective that critically interrogates the claims of green economy and understands that transition could only be just if it is guided by workers' organizations is crucial. The proposal must include a review of research methods, preferably focusing on a literature review and a set of feasible interviews with trade union representatives, industry and policy experts, and local actors. A focus on the role of trade unions and labour organisations along the supply chain in particular is essential.

#### **1.4. Tasks, contract duration and scope**

##### **Sub-project I: Mapping of the Global Automotive Industry in Transition**

###### **A) Issues and Questions**

The first sub-project must focus on mapping the broad outlines of the global automotive industry, with a specific focus on the existing German manufacturers, suppliers, unions and environmental actors, as well as their emerging counterparts in the Global South. The sub-project should be able to identify the regions and countries where actors that will shape the supply chains in the future are emerging, and provide an analysis. It is crucial also to build an overall picture of the supply chain from the extraction of raw materials and their processing through to manufacture and sales, as well as an understanding of production and distribution models.

###### **B) Deliverables**

- **Literature Review I.I:** A review of the state of the academic, sectoral, media and policy literature on the issues
- **Report I.II:** A final mapping report based on the literature review and interviews
- **Visualisations I.III:** A series of graphics in a cohesive style to communicate the fundamental findings and conclusions of the report.

The outputs must be produced either in German or English.

###### **C) Time Horizon**

This sub-project represents the foundation on which the rest of the project rests. Expecting the work on this sub-project to run mostly in parallel with the rest of the sub-projects, but end two months before the final deadline when work on the other two sub-projects should intensify, it should last for a total of three months in the period between 1 November 2021 up to 28 February 2022.

Literature Review I.I would be available in draft form by 30 November 2021, with the initial findings from the combination of the literature and interviews available by 1 February 2022 and the final report I.II and visualisations I.III by 28 February 2022.

##### **Sub-project II: Case study – A single manufacturer/model in transition**

###### **A) Questions**

In parallel with sub-project I, the consultant must create a case study of a particular German manufacturer and/or brand's experience of transition towards electrification.

- What considerations have been made in the decision to electrify?
- How has this decision affected the existing supply chains?
- How is the transition manifesting at the shop floor level?

- What new raw materials had to be sought?
- Etc.

B) Deliverables

- **Case study report II.I:** Based on a short literature review and a selection of expert interviews undertaken in tandem with sub-project I.
- **Visualisations II.II:** A series of graphics in a cohesive style to communicate the fundamental findings and conclusions of the report, complementing the visualisations of sub-project I.

C) Time Horizon

Since this sub-project would be influenced significantly by sub-project I, the work should be conducted in tandem. By 30 November 2021, the consultant should be able to provide a list of interviews to be conducted, with the majority of interviewees' participation having been agreed. The interviews should be mostly finalised, and a short evaluation/assessment of initial results should be available by the end of February 2022. The first draft of the case study report should be available by the end of March, and the final report and visualisations by the end of April 2022.

**Sub-project III: Identifying left actors working towards just transition**

A) Overview

While conducting both sub-project I and II, the consultant will be constantly scanning the literature and interviews for allies and parties interested in pursuing an explicitly leftist just transition that recognises the importance of socio-ecological factors, going beyond the current narrow focus on green economy and technology-forward solutions to fundamentally social problems.

B) Deliverables

- **List III.I:** An expanded list, for internal use, of potential partners, allies, target audiences and relevant parties in the labour and environmental movements, political activists, civil society, academics and etc. around the world along the supply chain.

C) Time Horizon

A draft version of the list should be made available half way through the project cycle at the end of January 2022, with the final list delivered at the end of the project.

**1.5. Expected qualifications and review criteria**

In your application, please specify how you plan to approach the project (2 pages max).

Please also submit a CV, cover letter, relevant work samples, references and complete the price sheet.

We are particularly keen to receive applications from individuals or agencies who can identify with the Rosa-Luxemburg-Stiftung's values and goals and have relevant experience in working on political or social issues.

The Rosa-Luxemburg-Stiftung expects the following qualifications, on which the selection will be based:

- Deep knowledge and awareness of the German automotive landscape, including an understanding of the broader trade union dynamics and a knowledge of IG Metall in particular

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- Knowledge of and/or interest in just transition, global supply chains and the global automotive industry
- Relevant experience carrying out mixed methods research for expert and lay audiences
- Proven track record in creating narrative reports based on original research with strong graphic elements
- A background in journalism
- Creative and detail-oriented
- Excellent communication skills
- Fluency in English and German

The following points are defined as evaluation criteria for the selection of the offer:

Review criteria	Weighting
B1 Price (Inclusive price for all basic services according to terms of reference)	50%
B2 Performance (work experience and expertise with regard to the advertised performance, knowledge of the subject area)	50%

**1.6. Travel expenses of the contractor**

The travel expenses are covered according to the internal guidelines of the client, after prior approval. This means that the client bears the travel and accommodation costs, regardless of the fee rate. Other costs such as expenses for telephone charges, use of public transport, etc. incurred in connection with the performance of the task will be reimbursed on presentation of appropriate receipts insofar as they are unavoidable and appropriate in the circumstances.

**1.7. Applications**

Applicants submit an offer specifying prices. For this purpose, the price sheet (Annex 2) must be used and submitted with the offer. Furthermore, we request a tabular CV with details of the work experience (in English, French or German language), at least three qualified references and a signed Self-declaration Form (Annex 3). The time availability during the contract period must be guaranteed.

If the applicants are subject to VAT, this must be communicated with the application together with the amount of the applicable VAT. If no communication is made, the price is the gross amount.

If you have any questions regarding the call for applications or your application, please send an e-mail to Vsevolod Kritskiy, Project Manager Trade Unions ([vsevolod.kritskiy@rosalux.org](mailto:vsevolod.kritskiy@rosalux.org)).

Please always use the subject line: **Call for Proposals – Study on the Transformation of the Global Automotive Industry.**

For reasons of transparency and equal treatment, all possible tenderers will be provided with the answers to questions.

Submission (digital) to:

**Please send your written application (by e-mail) to**  
 Vsevolod Kritskiy, Project Manager Trade Unions ([vsevolod.kritskiy@rosalux.org](mailto:vsevolod.kritskiy@rosalux.org))  
**by 15/10/2021, 12:00 o'clock Central European Time.**

**The receipt of applications will not be confirmed.**

Rosa-Luxemburg-Stiftung  
Chemin de Balexert 7-9  
1219 Châtelaine  
Switzerland

### **1.8. Award and contract process / time frame**

Negotiations are not allowed in this procurement procedure.

- Publication: 08/10/2021
- End of the offer period: 15/10/2021, 12:00 o'clock CET
- End of the award and binding period: 22/10/2021
- Award of contract: 22/10/2021
- Contract period: 01/11/2021 - 30/04/2022

## **Annex 2: Conditions of Participation**

### **1. General**

- 1.1. No costs will be reimbursed for processing the tender.
- 1.2. Terms and conditions of the tenderer are excluded. In case the tenderer declares his own terms and conditions as part of the contract, this constitutes an inadmissible amendment or addition to the contract and leads to the exclusion of the tender.
- 1.3. The information distributed in connection with this Call for Proposals may only be used for the preparation of the tender. Any use for other purposes is prohibited.

### **2. Content of the tender**

The following evidence/documents must be submitted with the tender:

- 2.1. Completed and signed Price Sheet (Annex 3)
- 2.2. Completed and signed Standard Tender Form (Annex 4)
- 2.3. Signed Self-declaration Form (Annex 5)
- 2.4. Signed Self-declaration on rate loyalty, minimum wage, and social security contributions (Annex 6)
- 2.5. Completed and signed Qualified References Form (Annex 7)
- 2.6. CV and/or Work samples (in English or German)

### **3. Exclusion of tenderers**

- 3.1. The Service Agreement will be concluded with knowledgeable, efficient and reliable tenderers only who are professionally carrying out the tendered services.

### **4. Conditions for submitting a tender**

- 4.1. The signed tender documents must be in English or German language. All required additional documents, statements, and samples must be submitted within the tender submission period. Correspondence with the tendering authority must also be conducted in English or German language.
- 4.2. The Standard Tender Form attached to the tender documents is to be used exclusively for the preparation of the tender. The tender has to be submitted document proof, legible, and unequivocal.
- 4.3. The tenderer is obliged to provide all explanations required in the tender documents and to provide all other required information. Incomplete or incorrect tenders are excluded from the evaluation.
- 4.4. Changes to the tenderer's entries must be unequivocal; otherwise, the tender is excluded. An incorrect entry should be crossed out and the correct entry should be added above or beside it. The tenderer's signature or initials should mark changes.
- 4.5. The tender and any other required documents and explanations should be signed by stating the date of conclusion at the given place. The name of the signatory must be recognizable, e.g. full name in block capitals below the signature. Tenders that are not properly signed at the specified place are excluded from the evaluation.
- 4.6. The signed tender form must be submitted with the tender as the included contract conditions are legally binding.

### **5. Corrections, changes, or withdrawal of the tender**

- 5.1. The tender may be amended, corrected, or withdrawn in writing until the expiry of the tender submission period.
- 5.2. Corrections, or changes, or the withdrawal of tenders is to be made in writing.
- 5.3. The award period begins with the expiry of the tender submission period. Until the end of the award period, the tenderer is bound to her / his tender. During this period, the tender can no longer be changed, or withdrawn.

**6. Prices**

- 6.1. The prices valid for the tender are indicated in the Price Sheet (Annex 4).
- 6.2. Prices are to be offered in EUR and stated without VAT (net).

**7. Award criteria**

The award criteria are set out in the Terms of Reference (Annex 1).

**Annex 3: Price sheet**

**Awarding of a Service Contract: Study on the Transformation of the Global Automotive Industry**

Dear Madam or Sir,

We offer you the execution of the services described in the call for application documents at the prices listed below. The application conditions and instructions in the invitation to submit the application (cover letter) are taken into account. We understand that the terms of reference will be part of the contract to be concluded. In such event, the offer encompasses these terms without restriction. In the case of incompleteness, the Client categorically excludes the offer from the evaluation.

Subproject.	Offer in accordance with the above mentioned terms of reference	Amount in EUR (net amount)
I		EUR
II		EUR
III		EUR
	<b>TOTAL</b>	<b>EUR</b>

If the applicants are subject to VAT, this must be communicated with the application together with the amount of the applicable VAT. If no communication is made, the price is the gross amount.

The prices are fixed prices. The inclusive price contains all expenses of the contractor excluding travel expenses. Until the expiration of the award and binding period on 22/10/2021, I am/we are bound by this offer.

<p><b>Company name /-address (company stamp if available)</b></p>           <p>_____</p> <p><b>Date</b></p>	<p>The incorrectness of the above information leads to the exclusion of the award procedure. The Client in the event of incorrectness without notice can terminate an awarded contract.</p>
<p>_____</p> <p><b>Signatures (possibly. digital)</b></p>    <p>_____</p> <p><b>(Name of the signatory in block capitals)</b></p>	<p><b>If the signature is missing, the tender is considered not submitted and will not be taken into account in the evaluation!</b></p>   <p><b>Incomplete offers will be automatically excluded from the award procedure!</b></p>



#### Annex 4: Standard Tender Form

Name of the tenderer (company name): Postal address of the tenderer:  represented by:
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To Rosa-Luxemburg-Stiftung Chemin de Balexert 7-9 1219 Châteleine Switzerland
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Email:
Phone No.:
Contact person:
Place and date of issue:

Dear Madam or Sir,

We offer you the execution of the services described in the tender documents at the prices indicated in the Price Sheet (Annex 3). The application conditions and instructions are taken into account. The tender contains all required information, explanations, and proofs. We accept the terms and conditions according to the tender documents without restriction.

The price information in the Price Sheet (Annex 3) are fixed prices for the period mentioned in the Terms of reference. Price changes are only possible based on legal requirements. Until the expiration of the award period on 22/10/2021, this tender binds us. In addition, we confirm the following components of the tender documents, which become part of the contract in the case of the award: Terms of reference (Annex 1), Conditions of Participation (Annex 2), Price Sheet (Annex 3), Standard Tender Form (Annex 4), Self-declaration Form (Annex 5), Self-declaration on rate loyalty, minimum wage, and social security contributions (Annex 6), Qualified References Form (Annex 7).

We are aware that proofs of self-declaration that (on special request of the awarding authority) are not considered as provided even if they are mentioned in the tender or in accompanying statements. By signing the tender, we confirm the content of all explanations and evidence, even if submitted in separate attachments.

Further requests by the tenderer:

- In case of non-consideration of the tender, please inform us about the rejection of the tender.
- With the additionally requested tenderer declaration (see explanation in box below) signed by all tenderers it is confirmed that the lead company is authorized to represent all tenderers before the awarding authority. All tenderers are jointly and severally liable for the contractual execution of the services by their signature.



Company name / address

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Date

Signature(s)

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Name of the signatory in block capitals

The incorrectness of forging or attached explanations, information, or documents leads to the exclusion from the award procedure. An already awarded contract may be terminated without notice for important cause in cases of violation of contractual secondary obligations.

The adjacent signature covers all explanations, information, and evidence of this tender, even if attached in a separate Annex.

An additional separate signature is required in the tenderer declaration only for joint tenderers!

If the signature is missing, the offer is deemed not to have been submitted, and is not considered in the evaluation.

Incomplete offers can be excluded from the award procedures!

### *Annex 5: Self-declaration Form*

1. The tenderer declares that

- no person who's behaviour is attributable to her or his company has been issued with a final sentence for or that his company has been fined with financial penalties according to administrative offence acts;
- her or his company's obligations to pay taxes, duties, or contributions to the social security have been met, and that in this regard no judicial or administrative decision exists, or that her or his company has fulfilled its commitments by paying taxes, fees and social security contributions including interest or penalties.

2. The tenderer declares that her or his company

- did not violate environmental, social, or employment obligations in the execution of public contracts;
- is not insolvent, and that no insolvency proceedings or comparable proceedings have been initiated against her or his company and its assets, that the opening of such proceedings has not been rejected due to a lack of assets, and that the company did not enter into liquidation nor has it ceased its activity;
- has not been guilty of serious misconduct in professional matters which question the integrity of the company.

3. The tenderer declares that there are no reasons for her or his company to be excluded due to undeclared work and illegal employment.

The tenderer undertakes to ask subcontractors to comply with the above statements 1 to 3.

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Date, stamp (if available) and legally binding signature

***Annex 6: Self-declaration on rate loyalty, minimum wage, and social security contributions***

The tenderer agrees

- to comply with the respective statutory minimum wage.
- to commit her or his subcontractors or distributors commissioned by him to comply with the respective statutory minimum wages.

If the tenderer or one of his subcontractors violate the above-mentioned obligations culpably, the awarding authority and the tenderer agree on a contractual penalty of 1 per cent of the contract amount for every culpable violation, in several cases of up to 5 per cent of the contract amount. The tenderer is also liable for the payment of a contractual penalty in case the obligations were violated by a subcontractor appointed by her or him or a subcontractor employed by the subcontractor.

The culpable non-fulfilment of the above mentioned obligations by the tenderer or its subcontractors entitle the awarding authority to a termination without notice.

I declare / we declare

- with my / our signature(s) to comply with the specific rate loyalty, minimum wage, social security contributions as listed above;
- to pay my / our employees the same remuneration for the same or equivalent work in the execution of the services.

I am / We are aware that a violation of this statement may result in my / our exclusion from further contract awards.

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Place, date

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Signature, company stamp (if available)



### Annex 7: Qualified References Form

#### Reference 1

Contracting authority with address	
Contractual object	
Contact person	
Phone number	
Contract period	

#### Reference 2

Contracting authority with address	
Contractual object	
Contact person	
Phone number	
Contract period	

#### Reference 3

Contracting authority with address	
Contractual object	
Contact person	
Phone number	
Contract period	

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Date, stamp (if available) and legally binding signature