

Future of Work and Just Transition in the face of multiple drivers of change:

Call for tender including the Terms of Reference for Guide of Practice

1. TERMS OF REFERENCE

1.1 BACKGROUND

The economic, political, social and organisational challenges revealed by the multiple crises of year 2020 make it clear that there is a need for further understanding and articulation of the various drivers of change through research, survey and trade union participation through different tools.

Particularly in the aftermath of the COVID-19 pandemic, changes have been accelerated and need to be carried out with some order linking the effects of COVID-19 pandemic, climate change, Industry 4.0 / digitalization, global pandemics, changing global trade relationships, etc.

Energy sector is key for industry, transportation and households. There is a path of de-carbonization towards renewable energies.

Moving towards cleaner energy is a prerequisite to achieve sustainable development in the energy sector as well as all other energy-dependent industrial sectors. Transition in the energy sector will bring about alternative cleaner energy sources and this transition will certainly have an impact on jobs and sustainable development in the different regions and sectors in the world.

The transition to renewable energy such as solar and wind energy will have a considerable impact on the societies and workers. IndustriALL therefore anticipates the need for a Just Transition in the energy transition process and believes that concrete responses are needed to protect the rights and living standards of the workers and to deliver high quality and sustainable industrial employment.

We may find variations when talking about sectoral policies on Just Transition, but in general terms, a Just Transition rests on three pillars:

- Sustainable Industrial Policies;
- Strong Social Support Programmes; and
- Creative Labour Adjustment Programmes.

The process is a long road to travel where trade unions are an active part of the decision-making process. IndustriALL Global Union already has in-depth policy papers and/or guidance documents on all these drivers:

- a) *Sustainable industrial policy*: The objective of IndustriALL is to seek solutions to situations affecting everyone: particularly climate change and the environmental, economic and social crisis. This was articulated with a report entitled "[Towards a Sustainable Industrial Policy](#)".

In this field, IndustriALL has produced a new report of "[Trade and industrial policy: implications for development and international labor standards](#)".

- b) *Sustainability and Climate Change*: IndustriALL's secretariat made a detailed analysis for each sector it represents with the "[IndustriALL Global Union Sectoral Sustainability Report](#)"

As continuation of the sustainability and climate change work, recently IndustriALL has focused on “Energy transition” [analyzing national strategies, and oil companies with the impacts for workers](#).

- c) *Industry 4.0 / Digitalization: With a specific report prepared by an experts’ group from the affiliated organizations with the title of “[The Challenge of Industry 4.0 and the Demand for New Answers](#)” and discussed by a global conference, IndustriALL Global Union has developed its position in this field.*
- d) *Future of Work: In order to understand and to respond effectively to the new challenges in the world of work around the International Labour Organization’s “Future of Work initiative”, in order to be able to advance its mandate for social justice, IndustriALL has developed its own “[Future of Work](#)” document.*
- e) *Just Transition: For preparing itself and its affiliates for the global transformation driven by “climate change and Industry 4.0”, IndustriALL Global Union has prepared its “[Trade Union Guidance for Just Transition](#)”.*

1.2 OBJECTIVE

On this base, with the support of Friedrich-Ebert-Stiftung (FES), IndustriALL develops and conducts a project on “The Future of Work and Just Transition in the Face of Multiple Drivers of Change”. With this project, IndustriALL Global Union wants to focus on an important driver: Just Transition, particularly around energy transition and climate change in the industrial sectors represented by IndustriALL.

IndustriALL wants to go one step further developing a Guide of Practice that will serve all IndustriALL affiliates as a tool to assist them in the process of transformation and change towards cleaner industries.

This project will cover all the sectors represented at IndustriALL Global Union, and it will be focused on the transition from the current jobs on fossil fuels based sectors towards jobs on cleaner industries, based in renewables, hydrogen, or creating green products. A "green" product must be environmentally responsible what means that the impacts generated during its production, use or final disposal are positive at an environmental level and add value to the final product. A "green" product can also count with favourable social and economic aspects during its production where exists specific socio-economic or demographic characteristics benefit.

It's needed to collect the information that already exists, along with examples and good practices from other countries, and create a series of steps that help unions defend workers' rights against companies and governments.

Tools and knowledge are needed to operationalize this process. There are countries like Germany, Canada and others where the energy transition processes have begun many years ago, giving way to a Just Transition for workers in the impacted sectors. There is a need to provide concrete, detailed, step-by-step examples of Just Transition.

1.3 POINTS THAT THE GUIDE SHOULD COVER

Preparation of a “Guide of Practice” will include the principles of Just Transition, its characteristics and, possibly above all, its impact on the different IndustriALL sectors. This will also include experiences at different levels and an analysis of case studies and good practices that may be drawn

from i.e. countries, regions, social partners, governments, NGOs, Civil Society Organizations, local communities, private sector, etc resulting in a step-by-step guide for trade unionists towards a Just Transition.

The content will be composed of:

- Principles of Just Transition: Key points of Just Transition, demands and needs of workers, trade unions and other stakeholders in the society.
- Mapping of the sectors and regions that would be impacted by the changes necessitated by Climate Change, with this information trade union will be able to formulate strategies based on their local realities. It would be needed to focus on the countries that dominate world fossil fuel production and consumption, as well as the countries investing the most in renewable energies, to find common points and impacts for those regions and sectors. It will vary from ones to others, for example, in the case of CIS region or India will be coal, in MENA will be oil and gas.
- Characteristics and impact in different sector within the jurisdiction of IndustriALL: Through IndustriALL's industrial sections, profiling out the level of impact on workers in all sectors with insights on how they will be able to meet the challenges. Interviews with IndustriALL's directors can be conducted.
- Experiences at different levels:
 - i) Country level sectorial Just Transition;
 - ii) Enterprise level Just Transition:
 - a. global;
 - b. country;
 - c. workplace.
- Analysis of case studies and good practices: Using concrete cases, through interviews with workers, trade unions and other stakeholders during the process where each step of Just Transition process has been developed. The stakeholders should cover different institutions, not limited to, but particularly the ILO, other GUFs, NGOS, CSOs, Private Sector companies, relevant state departments, relevant parliamentary portfolio members, members of relevant academic institutions, between others. It will be important to know in each case general circumstances and socio-labour relations of the stakeholders concerned. At least we should have one or two relevant cases in the sectors heavily impacted: energy, coal, steel, chemicals, machine equipment, cement, and from different regions if possible. The information required should be able to respond the following questions:
 - How did the transition process begin?
 - Who started it?
 - Were all stakeholders (Government, companies, workers) invited to the process from the beginning?
 - How were the relationships between the parties during the process?
 - What goals were set?
 - Were they short, medium and / or long term objectives?
 - Who controls the process?
 - And how is the process controlled? What tools have they used?
 - Have these tools been useful?
 - Have / or are the objectives set at the beginning of the process being achieved?
 - What can be improved in the process?

- If they could go back in time, would they have changed something?
 - What advice can you give to unions now facing an energy transition process?
 - What are their advices for the process to be successful?
- Step-by-step appendix for a Just Transition: Development of the steps needed to be taken by trade unions to initiate a Just Transition process where, depending on the situation, establishment of a social dialogue with companies and governments, start-up of the process, implementation and monitoring.
Each country is in a different situation, they have different natural resources and possibilities, they have more or less progressive governments, the labour force is well organised and dense, or the trade unions are small and unstructured. In some countries unions have good relations with companies and governments and have the power to influence energy policies, and in other countries relations are poor or non-existent.
For all of them it is necessary to create a list of step-by-step actions that will help trade unions to move forward in the energy transition, regardless of where they are at. They themselves will be able to see all the steps and decide where it is best for them to start the process, depending on their own characteristics.

1.4 METHODOLOGY

A work-calendar will be fixed at the beginning of the activity between the person(s) in charge and IndustriALL.

At the preparation process of the guide, there will be regular consultation, checking and interaction between IndustriALL and the person(s) in charge selected, to verify that the work is proceeded as planned and certain issues or investigate new findings are pursued.

On the checkpoints, the person(s) in charge will prepare a brief summary with the last work done in order to follow it up and decide if it should continue in the same way or changes are needed to be introduced.

The guide will be one-size-fits-all with general remarks and special chapters, if needed, divided by areas/regions.

The format will be a Word document in order to make easier its edition and translation. When this will be done another complementary options as an online tool-kit can be explored.

Developing / producing a set of slides (presentation) summarizing and explaining the Guide of Practice and Methodology used, for IndustriALL to be able to present it in seminars and trainings.

1.5 TIMEFRAME

- 16 July 2021: Publication of the call for tender
- 25 July 2021: Deadline to receive offers from researchers
- 10 August 2021: Messages with the result will be sent to the applicants. The selected person will receive an email stating that he/she has been selected together with the contract to perform the task. This contract must be signed and returned by email within 24 hours of receipt of the email to djunquera@industrialall-union.org
- 11 August 2021: The elected applicant returns the signed contract to IndustriALL. IndustriALL signs the contract too and sends the signed contract by email to the applicant, who can then start working on the project.

- 11 August 2021: Discussion of the work with the person who has been awarded the contract and fix of the calendar and setting the timetable of activities, milestones, meetings, etc....
- 13 October 2021: Submission of the first draft of the Guide of Practice and summary slides
- 20 October 2021: Feedback from IndustriALL based on review of the first draft
- 29 October 2021: Submission of the final Guide of Practice document and summary slides

2. EXPERT PROFILE / ELIGIBILITY

It is necessary that the person(s) who will carry out the work have an in-depth knowledge about energy transition and climate change, as well as Just Transition.

It is important that the expert(s) have knowledge and sensitivity about labour issues, including fundamental rights, trade union work and structures. It will be a comparative advantage for the expert(s) to have contacts and links with national and international trade unions and relevant organizations working on these issues. This translates into the following requirements:

- Academic and/or student in the area of energy transition. Knowledge on climate change and impact on workforce will be welcome.
- Trade union background and experience preferred with additional profile with respect to energy transition
- Knowledge of the international trade union system, and interest in strengthening workers' representation in new areas
- Availability to develop the project between August and November 2021 included
- Capability to do:
 - Desk-top-Research
 - Interviews with trade union and company as well as employers' association representatives and other relevant stakeholders.
 - Capability to produce documents in English, namely word document (Guide of Practice) and power-point slides.
- Excellent research and writing skills (in English) required

The expert must be able to conduct the task and reporting as well as potential stakeholder interviews in English; knowledge of reading other languages as German, Spanish or French would be also welcome.

3. RIGHT OF USE

IndustriALL, the Friedrich Ebert Stiftung who is supporting this task, and any third party will be entitled to reproduce the guide of practice and the summary slides as a whole or in part and as often as required including the usage online.

4. DEADLINE FOR SUBMISSION OF THE OFFER AND BINDING PERIOD FOR THE OFFER

Please submit your offer in **English** and **in writing** to Diana Junquera Curiel (by e-mail djunquera@industrialall-union.org) by **25 July 2021, 12:00 o'clock (Geneva Time)**. Offers received after this deadline will not be considered. Your offer must be **valid until** at least **15 August 2021**.

5. AWARD CRITERIA

The tenders will be evaluated according to the following award criteria:

5.1 QUALITY AND CONTENT OF THE OFFER (70%)

The quality of the offer will be evaluated based on past products or services, level of knowledge as well as on how the expert plans to deliver the requested performance.

Please submit together with your cover letter in which you express your interest in the offer (one-page maximum) the following information:

- a list of relevant papers you have conducted on Energy Transition or Just Transition
- two samples of these papers
- information on other relevant activities (2-3 lines max/each activity) that you have conducted that can help evaluate your level of knowledge on the topic
- a list of activities conducted with the international or global labour movement
- information on relevant activities (2-3 lines max/ each activity) that you may have conducted with Global Unions, or with MNCs.

5.2 COST (30%)

The cost offer will be evaluated by measuring the offered services against the price. The maximum budget for this assignment is 15.000 €, quotes will be measured by the best price/service ratio.

Please provide a financial offer with a basis for calculation (e.g. 25 working days at 400€/day). Please indicate your net price in euros (i.e., excluding VAT).

6. EXPECTED DATE OF AWARD FOR THE CONTRACT:

10 August, 2021: The selected person will receive an email stating that he/she has been selected together with the contract to perform the task.

This contract must be signed and returned by email within 24 hours of receipt of the email to djunquera@industrialall-union.org

11 August 2021: The elected applicant returns the signed contract to IndustriALL. IndustriALL signs the contract too and sends the signed contract by email to the applicant, who can then start working on the project.

7. GENDER DIMENSION

IndustriALL Global Union strives to increase the number of female researchers and activists in academia, science, trade union education and activism. Applications from female researchers are therefore explicitly welcome.