



Ref.: EDAC202106007

Brussels, 03/06/2021

Subject: Ex-ante publicity notice for the negotiated procedure 21.ISE.NP3.026
“Study on National Industrial Strategies and Policies in EDA participating Member States
relevant for the European Defence Industrial Base”

To whom it may concern

The European Defence Agency (EDA) will shortly launch a call for tenders for the award of the above-mentioned middle value contract.

Should you be interested in being invited in the above-mentioned call for tenders, please follow the instructions below.

In order to help you assess whether the envisaged contract is of your interest, the following information is hereby communicated.

Outline description of the envisaged contract	
Type of contract	Direct service contract
Maximum estimated budget available for the contract	EUR 90 000
Duration of the contract	7 months
Subject matter of the contract	<p>The main objective of this study is to analyse the latest national (defence) industrial strategies and policies in EDA participating Member States relevant for the development, production and procurement of defence equipment. The aim is to provide an overview about existing policy documents at the national level and evaluate to what extent they consider the EU defence environment and/or influence national attitudes toward EU defence cooperation. The analysis will also highlight the possible adaptation of industrial strategies as a reaction to the new defence environment in Europe (new defence initiatives - e.g. CARD, PESCO, new instruments developed by the European Commission – EDF, impact of the COVID-19 crisis, change of levels of defence budgets).</p> <p>The research will provide an overview of existing national strategies and policies relevant for defence industry, by devoting a specific focus on the following aspects:</p> <ul style="list-style-type: none">➤ National approaches towards EU defence cooperation;

	<ul style="list-style-type: none"> ➤ National approaches towards industry engagement in the context of national defence planning; ➤ Relevance of national and regional industrial policies for defence industries and accessibility of economic (e.g. innovation, financing, export) instruments for defence industry; ➤ Measures in place to support Small and Medium-Sized Enterprises; ➤ The reflection of the notion of strategic autonomy (e.g. policies to limit external dependencies, existing regulations in the field of foreign investments); ➤ Attitudes toward third parties. 												
<p>Participation in the negotiated procedure</p>	<p>Participation in EDA’s public procurement procedures is open on equal terms to all natural and legal persons coming within the scope of the EU Treaties. When applying the rules of access to the market, it is the country where the tenderer is established which is to be considered. As regards a natural person, it is the State in which the person has his domicile.</p> <p>EDA procurement procedures are not covered by the WTO Multilateral Government Procurement Agreement (GPA). Tenderers established in third countries (non-EU countries) do not have the right to participate in procurement procedures unless international agreements in the field of public procurement grant them the right to do so. In case there is no such agreement, or the agreement does not apply to the kind of contracts put out to tender, tenderers of third countries are not entitled to participate.</p> <p>The relevant international agreements in the field of public procurement are the Stabilization and Association Agreements (SAA) and the European Economic Area Agreement (EEA). Currently, the following countries have signed and ratified the above Agreements and therefore economic operators established in Iceland, Liechtenstein, Norway, North Macedonia, Albania, Montenegro, Serbia, Kosovo, Bosnia and Herzegovina also have the right to participate in EDA’s public procurement procedures.</p>												
<p>Selection criteria: necessary capacity to implement the contract</p>	<p>Potentially interested economic operators are hereby informed that the following selection criteria will be assessed in the scope of the envisaged negotiated procedure:</p> <p style="text-align: center;">Economic and financial criteria</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 33%; text-align: center;">Criterion</th> <th style="width: 33%; text-align: center;">Minimum capacity</th> <th style="width: 33%; text-align: center;">Evidence/supporting documents</th> </tr> </thead> <tbody> <tr> <td>Economical and financial capacity</td> <td>1.1. The tenderer must have a minimum annual turnover for the last three financial years for which accounts have been closed of 90 000 EUR.</td> <td>1.1. The duly completed and signed Financial and Economic Capacity Overview Form in annex to the tender specifications.</td> </tr> </tbody> </table> <p style="text-align: center;">Technical and professional criteria</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 33%; text-align: center;">Criterion</th> <th style="width: 33%; text-align: center;">Minimum capacity</th> <th style="width: 33%; text-align: center;">Evidence/supporting documents</th> </tr> </thead> <tbody> <tr> <td>Minimum capacity level relating to tenderers</td> <td>2.1. The tenderer shall demonstrate knowledge and experience in all of the following aspects</td> <td>2.1. The tenderer shall demonstrate to have successfully delivered at least two projects addressing/proving their</td> </tr> </tbody> </table>	Criterion	Minimum capacity	Evidence/supporting documents	Economical and financial capacity	1.1. The tenderer must have a minimum annual turnover for the last three financial years for which accounts have been closed of 90 000 EUR.	1.1. The duly completed and signed Financial and Economic Capacity Overview Form in annex to the tender specifications.	Criterion	Minimum capacity	Evidence/supporting documents	Minimum capacity level relating to tenderers	2.1. The tenderer shall demonstrate knowledge and experience in all of the following aspects	2.1. The tenderer shall demonstrate to have successfully delivered at least two projects addressing/proving their
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		<p>* European Defence Industry policies and initiatives, both at the national and EU level:</p> <p>* defence-related analysis, with a good grounding in defence market and industry and its specificities.</p> <p>* knowledge of EU defence environment, including EU-level policy instruments/mechanisms which may involve industry-related elements (e.g. PESCO, CARD, EDF).</p> <p>* knowledge of policy-making processes and analysis.</p> <p>2.2. The tenderer shall demonstrate experience in consultation activities with EDA participating Member States, defence industrial stakeholders (including industry associations, prime contractors, supply chain industries) and/or other relevant organisations, agencies or bodies.</p> <p>2.3. The tenderer shall demonstrate capacity to draft reports in English.</p>	<p>experience in all the above mentioned aspects within the last five years, for a minimum value of 50 000 EUR per project.</p> <p>2.2. The tenderer shall demonstrate to have successfully delivered in the last three years at least two consultation events (e.g. debates, panels, surveys, workshops) where the abovementioned stakeholders were the key audience/participants.</p> <p>2.3. The tenderer shall demonstrate to have successfully delivered in the last three years at least three such reports.</p>
	<p>Criterion</p> <p>Minimum capacity level relating to the team delivering the service</p>	<p>Minimum capacity</p> <p>2.4. The tenderer shall demonstrate its capacity to provide a qualified team of at least three (3) persons, of which at least one (1) Project Manager and at least two (2) Experts, having at least the following qualifications/expertise:</p> <p>Project Manager: Must demonstrate at least 5 years of experience in activities such as project coordination, including</p>	<p>Evidence/supporting documents</p> <p>2.4. The CVs of experts detailing the educational and professional qualifications and experience. The Europass curriculum vitae format shall be filled in.</p> <p>Each CV provided shall indicate the intended function in the delivery of the study. The precise contractual link with the</p>

	<p>overseeing project delivery, quality control of delivered service, stakeholders' consultation, client orientation and conflict resolution experience in project of a similar size.</p> <p>Experts: Each expert must demonstrate relevant higher education degree. The experts' profiles shall cumulatively cover:</p> <ul style="list-style-type: none"> - At least five years of professional experience, in the areas indicated under the criterion 2.1 above. - Linguistic skills with good knowledge of, at least, French and German, as guaranteed by a certificate or past relevant experience. <p>All team members must demonstrate excellent proficiency in English language (written and oral). At least one team member must have demonstrated have native-level language skills and the ability to perform language quality check in English, as guaranteed by a certificate or past relevant experience.</p> <p>The Project Manager may also act as Expert, but this has no impact on the requirement to have a qualified team of at least three (3) persons.</p>	<p>tenderer has also to be described.</p>
<p>Indicative date for launching the negotiated procedure</p>	<p>NB: Whilst <u>no documents need to be submitted at this stage to prove that the above criteria are met</u>, potentially interested economic operators are strongly advised to verify that they fully comply with the announced criteria.</p>	
<p>Indicative time schedule for signing the contract</p>	<p>The envisaged contract will be signed indicatively by 10/10/2021.</p>	

If you are interested in being invited in the above-mentioned call for tenders, please reply to this ex-ante publicity notice by sending via email the filled-in **Reply Form**. Such Reply Form shall be sent to no later than **17/06/2021 at 17:00** (Brussels time) to the following EDA functional mailbox:

procurement@eda.europa.eu

No evaluation is performed at this stage. All the economic operators who have expressed their interest to participate in this procurement procedure within the above-mentioned deadline will be subsequently invited to submit a tender. The contracting authority reserves the right to also invite economic operators not included in the list of interested economic operators who responded to this ex-ante publicity.

Only the candidates invited by the contracting authority to participate in this procurement procedure will be admissible.

This publicity is in no way binding for the EDA. The EDA's contractual obligation commences only upon signature of the contract with the successful tenderer.

Submission of an expression of interest implies acceptance of receiving the invitation to tender by electronic means. **It is the tenderer's responsibility to provide a valid e-mail address together with their contact details in the Reply Form and to check their e-mail regularly.**

We look forward to receiving your expression of interest.

Annex: Reply Form (Expression of interest)

REPLY FORM (Expression of interest)

Please return the present page duly completed to the following e-mail:
procurement@eda.europa.eu

Please indicate in the subject line of the e-mail the title and number of the procedure:

21.ISE.NP3.026 - "Study on National Industrial Strategies and Policies in EDA participating Member States relevant for the European Defence Industrial Base"

Name of the Company	
Title, first name and last name of contact person, and Function within the Company	
Address of the Company (including post code, town, country)	
Telephone (with international prefix)	
E-mail of the contact person ¹	

Upon reception of your expression of interest, your personal data will be recorded and further processed by EDA for the sole purpose of drawing up list of interested economic operators that will be invited to take part in the present negotiated procedure. Such data will be processed by EDA in accordance with Regulation (EU) 2018/1725², pursuant to Article 31 of Council Decision (CSFP) 2015/1835.

Details concerning processing of your personal data are available in the privacy statement at the page:

<http://www.eda.europa.eu/docs/default-source/procurement/privacy-statement.pdf>.

¹ Where the invitation to tender will be sent.

² Regulation (EU) No 2018/1725 of the European Parliament and of the Council of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC (OJ L 295, 21.11.2018, p.39) .