
Specifications – Invitation to tender No **VT/2007/005**

Academic Network of European Disability experts (ANED)

**1. Title of the contract: *Academic Network of European Disability experts*
VC/2007/388**

2. Background

In its Social Agenda (2005-2010), the Union has fixed as its overall strategic goal to promote more and better jobs and to offer equal opportunities for all. The realisation of the Social Agenda relies on a combination of instruments comprising EU legislation, the implementation of open methods of coordination in various policy fields and financial incentives such as the European Social Fund.

Until now, the implementation of the open methods of coordination in the employment and social inclusion/social protection fields relied on two distinct Community programmes. Equally the promotion of gender equality and of the non-discrimination principle was at the core of two distinct Community programmes. And lastly promotion of labour law including health and safety regulations were dealt with by separate interventions.

With the view of fostering greater coherence and simplification in the way Community programmes are delivered, the Commission proposed that all these separate programmes be now integrated into one framework programme, PROGRESS.

The Decision n°1672/2006 establishing a Community Programme for Employment and Social Solidarity – PROGRESS was adopted by the European Parliament and the Council on 24 October 2006 and published in the OJ on 15 November 2006.

PROGRESS overall aim is to financially support the implementation of the objectives of the European Union in the employment and social affairs area, as set out in the Social Agenda, and thereby contribute to the achievement of the Lisbon Strategy goals in these fields.

It aims at supporting the core functions of the European Community towards fulfilling its Treaty-delegated tasks and powers in its respective areas of competence in the employment and social sphere. It will support initiatives aimed at reinforcing the role of the Community in proposing EU strategies; implementing and following-up EU objectives and their translations into national policies; transposing and following-up of EU legislation's application in a coherent way through Europe; promoting the co-operation and co-ordination mechanisms between Member States and cooperating with social partners and organisations that represent civil society.

More specifically, PROGRESS will support:

- (1) the implementation of the European Employment Strategy (section 1);
- (2) the implementation of the open method of coordination in the field of social protection and inclusion (section 2);
- (3) the improvement of the working environment and conditions including health and safety at work and reconciling work and family life (section 3);
- (4) the effective implementation of the principle of non-discrimination and promotion of its mainstreaming in all EU policies (section 4);
- (5) the effective implementation of the principle of gender equality and promotion of its mainstreaming in all EU policies (section 5).

It is divided up into five policy sections which are (1) Employment, (2) Social inclusion and social protection, (3) Working conditions, (4) Non-discrimination and (5) Gender Equality.

Against this background, PROGRESS pursues the following general objectives, as set out in article 2.1 of the Decision:

- (1) to improve the knowledge and understanding of the situation prevailing in the Member States (and in other participating countries) through analysis, evaluation and close monitoring of policies;
- (2) to support the development of statistical tools and methods and common indicators, where appropriate broken down by gender and age group, in the areas covered by the programme;
- (3) to support and monitor the implementation of Community law, where applicable, and policy objectives in the Member States, and assess their effectiveness and impact;

- (4) to promote networking, mutual learning, identification and dissemination of good practice and innovative approaches at EU level;
- (5) to enhance the awareness of the stakeholders and the general public about the EU policies and objectives pursued under each of the policy sections;
- (6) to boost the capacity of key EU networks to promote, support and further develop EU policies and objectives, where applicable.

The present Call for tenders is issued in the context of the implementation of the PROGRESS 2007 annual plan of work which is consultable at: http://ec.europa.eu/employment_social/progress/index_en.html

Specific activities in the framework of the Social and equal opportunity policies are directly related to people with disabilities. The European Activities in this area are described in two European Commission Communications that describes the strategies from 2003 to 2010, a set of key actions and report on progress achieved so far:

- Communication from the European Commission on establishing equal opportunities for people with disabilities: a European Action plan. (COM/2003/650)
- Communication from the European Commission on the situation of disabled people in the enlarged European Union: the European Action plan 2006 – 2007 (com/2005/604).

These and other relevant documents can be found at: http://ec.europa.eu/employment_social/index/7003_en.html

3. Subject of the contract

3.1. Background to : Equal opportunities for people with disabilities: A European Action plan 2003-2010

2003 was the European year of people with disabilities. It had as main objective to promote awareness at all levels in the Member States, involving key stake holder in particular disabled people themselves and the organisations which represent them. One of the results of this European Year was the launching of a European Action plan aiming at improving the situation of people with disabilities in Europe by providing Equal opportunities for people with disabilities.

The basis for the Commission approach is that disability is a rights issue and not a matter of discretion. The disability strategy is therefore based on the elimination of discrimination and a determination that people with disabilities should have the same rights as non-disabled people. Moreover they should have access to those rights, not only in theory but also in practice. This in turn requires adequate policies, legislations and actions aiming at equal opportunities and defined together with disabled people themselves.

The European Commission approach is an inclusive one by not identifying separate categories of persons with disabilities but instead focusing on the needs of the individuals. This is a natural evolution from the social model of disability in which there has been a gradual move away from disability-specific programmes, towards a more mainstreamed and inclusive approach. The Commission advocates and implements the mainstreaming of disability issues in all Community programmes and policies because this is a much more inclusive approach and a better way to achieve full equality of opportunity for disabled people – a principle that is at the very heart of the Commission disability strategy.

3.2. The Action plan:

Adopted in 2003, the Action plan identified three main areas of work

- Full application of the Employment Directive 2007/78/EC
- Mainstreaming disability issues in Community policies
- Improving Accessibility for All

The Action plan is a rolling multi annual plan with a biennial report describing the key activities to be undertaken in the coming two years and the key results achieved in the previous two years. This allows the Plan to respond to developments in Member States and also to maintain the involvement of stake holders in defining the new priorities.

Accordingly, the Plan set four strategic objectives for 2004-2005

- Access and retention of employment
- Lifelong learning
- Using the potential of new technologies
- Accessibility to the public built environment

In 2005 a new Communication on The situation of disabled people in the enlarged Union, reported on the achievements in the previous domains and established four new priority areas for 2006-2007:

- Encouraging activity (beyond employment)
- Promoting access to quality support and care services
- Fostering accessibility of goods and services
- Increasing the EU's analytical capacity

A Communication under preparation for end 2007 will define the priorities for the remaining two years covered by the Action Plan.

3.3. *Purpose of the Contract*

The Commission is looking for the creation of a European network of experts in the field of disability. The academic network should provide scientific background and support in the disability field. The network should contain experts not only in the disability field but also in the Community policies that are relevant for people with disabilities as identified in the Action plan.

The European Action plan is a policy instrument that reflects the choices and priorities actions in the disability area to reach the objectives of achieving Equal opportunities for people with disabilities in Europe. Every two years the Commission reports on the progress achieved and select a new set of priorities for the following 2 years. For the selection of new priorities, following the principle of Better Regulation¹, the Commission holds an exchange of view with the Member States and key stake holders as well as gather evidence and information of the situation of people with disabilities in Europe in order to take informed decisions in the next phases of the Action Plan.

The purpose of this tender is to support the Commission in her facts finding and gathering evidence task, to provide solid information and recommendations that will contribute to take informed decisions.

The network should provide information and recommendations in the fields identified in the Action plan. The recommendations should be supported by scientific evidence, knowledge and foundations.

3.4. *Objectives of the network / expected results*

The academic network of disability experts should provide the European Commission with expertise and support to describe and analyse the situation of people with disability in the European Union and EFTA countries, and to develop the concept and methodology of mainstreaming in the main policies and strategies of the Community that are relevant for people with disabilities.

In particular the following should be considered:

- The revised Lisbon Strategy for growth and employment including the related aspects of the European Employment Strategy and of policies on education and training,
- The Open Method of Coordination on social protection and social inclusion
- Application of the Open Method of coordination in the Youth field
- Main policies in the areas identified in the Disability Action Plan as relevant for mainstreaming disabilities (such as transport, ICT, built environment,...)

Furthermore the network should be competent to monitor relevant international developments, notably related to the implementation of the UN Convention both via legislation and in practice.

The Network, through the results of its academic research and their activities, should support the development and implementation of the European Action plan for people with disabilities.

Mainstreaming, a key priority in the European disability policy, requires that policy makers at national level are well informed and supported in their efforts. The Network can contribute to this process through the results of their academic research, addressing key policy areas. The collaboration among European umbrella organisations, representatives of people with disabilities and actor in the field and expert can make better use of the scarce resources in this field.

The network should carry out research activities aiming at:

-Mapping the current situation of people with disabilities in all the Member States and EFTA countries with actual policy reality, identifying gaps and suggesting research activities as well as policy recommendations.

¹ http://ec.europa.eu/information_society/activities/einclusion/index_en.htm#_ftn32#_ftn32

- Collecting qualitative and quantitative data at national level to support with evidence the previous aim.
- identifying European policy challenges where Trans national research activities have an added value and recommend possible actions
- Developing a cooperative work environment where the members of the network can share their knowledge and work, carry out joint research activities, share and publicise the results of their research.

3.5. Description of the network

The academic network of European disability experts should:

- Cover all the 27 Member States, EFTA and candidate countries
- The members should be organisations with a well recognised academic expertise and contribution in the disability field.
- Each Member organisation should have a team of experts active in the field well before the publication of this tender. The experts should be knowledgeable in the disability field as well as in European policies.
- The network should also include as a member at least one delegate from an organisation representing people with disabilities and the interest of people with disabilities at European level.
- The network should provide on annual basis a detail work plan of activities.
- People with disabilities should be actively involved in the research activities of the network.

3.6. Specific Objectives

The specific objectives of this tender are:

- to set up a network of academic disability experts that provides the European Commission with the requested expertise on disability issues. - The work of the network should lead:
 - to prepare for mainstreaming of disability in the following Open Methods of Coordination:
 - European Employment Strategy
 - Social Protection (pensions; health and long term care) and Social inclusion
 - European future objectives of education and training systems
 - European Youth field
- to develop discussion fora, among experts in the field, on line and through conferences and workshops, in key policy areas involving people with disabilities fostering networking among key actors.
- to gather qualitative and quantitative data and interpret existing statistics to better understand and describe the situation of people with disability in Europe.
- to identify and analyse the key European policies to be address and their level of mainstreaming disabilities in order to provide improved methodological approaches for successfully address disability issues. (including accessibility policies identified as relevant in the European Disability Action plan like in transport, ICT, built environment,...)
- to tackle the issue of multiple discrimination as regards, women, older people, migrants/people from ethnic minorities that have disabilities
- to identify, gather and analyse examples of good practice at European level or at national level that are transposed or can be reproduced or adapt in other Member States as well as facilitating and promoting exchange of these practices, while identifying the conditions to be met to allow successful transposition.
- to provide policy recommendations to improve mainstreaming of disability issues in European policies.
- to create an online resource of data, knowledge, examples of good practice, research results, policy recommendations
- to elaborate thematic reports in each area highlighting key policy results and conclusion in an easy to read format.
- to organise a yearly workshop to discuss the key issues identified and a final conference by the end of the contract to present the results of the work.

The contract will cover the 27 EU Member States and the three EFTA/EEA countries²

If necessary, additional contracts concerning similar services in candidate countries participating in the Progress programme may be awarded, following the signature of the respective Memoranda of Understanding, by negotiated procedure, on the basis of Article 126(1)(f) of the Implementing Rules of the Financial Regulation.

4. Participation

Please note that:

- The competition is open to any physical person or legal entity coming within the scope of the Treaties and any other physical person or legal entity from a third country which has concluded with the Communities a specific agreement in the area of public contracts, under the conditions provided for in that agreement.
- Where the Multilateral Agreement on Public Contracts concluded within the framework of the WTO applies, the contracts are also open to nationals of States that have ratified this Agreement, under the conditions provided for therein. It should be noted that research and development services, which come under **category 8 of Annex II A of Directive 2004/18/CE**, are not covered by this Agreement.
- In practice, the participation of applicants from third countries that have concluded a bilateral or multilateral agreement with the Communities in the area of public contracts must be allowed, under the conditions provided for in that agreement. Bids submitted by applicants from third countries that have not concluded such an agreement may be accepted, but may also be rejected.

5. Tasks to be carried out by the contractor

5.1. *Description of the tasks*

Task 1: Set up a collaborative working environment

The contractor should set up a common working environment for data gathering, analysis and sharing of the information on the situation of people with disabilities, specific policy developments in the field as well as relevant policies for mainstreaming disability issues.

The information gather should be organised in a system that is accessible for the Commission in order to be able to consult the sources at a later stage if needed.

The system should permit the storage, share, use and consultation of all related information, reports, publications, information on conferences, graphical material, and web sites.

Task 2: Work methodology and organisational issues

The contractors should provide a description of the methodology of work of the network as well as a work plan for the duration of the network contract with a detail annual activity plan that will be updated on yearly basis.

The contractors should identify specific priorities and tasks for each of the members as well as common activities.

It is important to specify regular working meetings and expert workshops.

Task 3: Data collection and analysis

The contractor should collect and analyse existing data to understand and illustrate the situation of people with disability in Europe:

-disability statistics (Eurostat, National data, OCDE, ...)

-examples of good practice (projects, research activities, policy measures, pilot initiatives)

Where needed and justified the Members of the network should develop new data in order to cover existing gaps, either by:

-carrying out desk research

-field visits and onsite interviews

² Iceland, Norway and Liechtenstein

-using questionnaires and collecting new statistics

All the information and data gathered should be publicly and on line available. The analysis of the data as well as policy oriented executive summaries should be prepared and published.

Task 4: Policies follow up and evaluation

The contractor should provide a systematic way to identify and analyse key relevant policy areas. The contractor should address the main policy areas mentioned in the various phases of the Action Plan for people with disabilities.

At least the following policies should be analysed in details providing recommendations:

- The European Employment Strategy including the documentation and reporting available by the Open Method of coordination in Employment. Particular attention will be paid to the Member States reform programmes and their implementation
- Open Method of coordination in Social inclusion and social protection in particular the National Strategic Reports
- Open method of coordination in the area of education
- Open method of coordination in the area of health and long term care
- The European Structural funds and in particular the European Social fund and the Member States Strategic orientations.
- The new Social Services of general interest agenda
- Implementation of the disability aspects of the new State Aid regulations
- The European policies for Youth
- Main policies in the areas identified in the Disability Action Plan as relevant for mainstreaming disabilities. (Including accessibility policies like in transport, ICT, built environment,...)

If requested the contractor should respond to scientific requests from the Commission.

The contractor should follow the main European processes for policy development in the European institutions and the related documents, for example:

- European Legislation in particular antidiscrimination legislation and disability targeted legislation.
- Council Conclusions, Resolutions and recommendations
- European Parliament Resolutions
- European Commission Communications and staff working papers
- European Economic and Social Committee opinions
- Committee of the Regions opinion

On each of the subjects the contractor should elaborate a final reports identifying, key actors (researchers and policy), key findings of the research, conclusions and recommendations.

Task 5: Analysis and implementation of key international issues

The Commission has announced its intention to sign the United Nations Convention on the rights of people, with disabilities. The Contractors should analyse the practical implementation of the articles of the Convention and the examples of key activities that are carried out to implement not the formalities of the Convention but the practical implementation of the Spirit of the convention.

The practical examples should be collected analysed, publicised and a methodological and practical approach should be developed for its transposition to other Member States or at EU level.

Task 6: Workshops and final conference

At the end of each contractual year, the organization of an annual academic meeting with the network Members but also open to other academic groups, users and other key stake holders to discuss key actions. The specific subject will be agreed by the Commission based on proposals of the Network. All the organisational costs and work will be under the responsibility of the contractor (venue, accessibility, interpretation, documentation including report of the meeting, scientific programme, travel and subsistence max 60 persons, accompanying assistant for people with disabilities ...)

At the end of the Contract after the last renewal, the organization of final conference in Brussels (ca. 200 participants: experts, Commissioner, Commission, representatives of EP, Presidency, and umbrella organizations of civil society). All the organisational costs and work will be under the responsibility of the contractor (venue, accessibility, interpretation, documentation including conference proceedings, scientific programme, and travel and subsistence max 150 persons, accompanying assistant for people with disabilities ...).

Task 7: Reporting Dissemination and publication

The Contractor should provide to the Commission an inception note 1 month after signature of the contract. The report will be discussed with the Commission and adjustments be made if needed.

The Contractor should provide also a regular annual report with the main achievements of the different tasks.

The contractors should elaborate thematic reports in each key area highlighting key policy results and conclusion in an easy to read format. (in EN, FR, DE)

At the end of the contract after the last renewal, the final report should provide detailed analysis, conclusions and recommendations together with a publishable short version of the report. This last report should contain the main findings and should be aimed at policy makers and people with disabilities. A simple language and structure is needed.

All material collected and produced during the previous tasks should be provided to the Commission as an annex to the annual and final evaluation reports. The Commission will decide the key relevant data and results to be published by the contractor on line.

The network should provide recommendations for the follow up of the Action Plan after 2010 and for mainstreaming disability issues in the main European relevant policies.

These recommendations should consider the European vision of the Social Agenda after 2010. The recommendations should address mayor European trends like the Ageing of the population and increase of disability rates, the economic implications of the proposed solutions and actions to achieve them as well as the need for a sustainable strategy in this field from the social and economic perspective.

During the execution of the work, the contractor might develop and use a website that needs to be accessible in content, architecture and organisation conformant with WAI/ WCAG 1.0 level AA. The Commission might provide if deemed necessary a link from the DG EMPL site to the contractor site to facilitate the work.

At the end of the work, the Contractor should provide all relevant information and results of the study in the form of an accessible website so that the Commission can, publish this information on line if so decides. All pages and their content have to be submitted in 3 languages German, English and French.

The contractor should ensure that the content, organisation and architecture of the web site, including the pages and their content would be accessible in conform to WAI/ WCAG 1.0 level AA and to the Information Providers Guide of Europa IPG as described in http://ec.europa.eu/ipg/index_en.htm.

The contractor will produce this site using static pages. In the case other technology is being needed to build or update the site the contractor will consult the Commission and will need formal written approval by the Commission on the technology to use before starting this work.

The Commission reserves the right to decide at the end of the contract if the contractor will build the site themselves or if they would provide all necessary content and architecture so that the Commission can take care of the building of the site."

5.2. Guide and details of how the tasks are to be carried out

The PROGRESS Programme aimed at promoting gender mainstreaming in all its five policy sections and commissioned or supported activities. Consequently, the Contractor will take the necessary steps to ensure that its proposed team and/or staff respects the gender balance at all levels. It will also pay due attention when appropriate to the gender dimension of the service he is asked to deliver as detailed in the description of tasks.

Equally, needs of disabled people shall be duly acknowledged and met while executing the requested service. This will in particular entail that where the Contractor organises training sessions, conference, issues publications or develops dedicated websites, people with disabilities have equal access to the facilities or the services provided.

In particular the Contractor should consider also the personal accessibility requirements of the persons with disabilities that will be address on individual bases.

Finally, the Contracting Authority encourages the Contractor to promote equal employment opportunities for all its staff and team. This entails that the Contractor shall foster an appropriate mix of people, whatever their ethnic origin, religions, age, and ability.

The Contractor will be required to detail in its activity report accompanying the request for the final instalment the steps and achievements it made towards meeting these contractual provisions.

The contractor should include in their tender all costs necessary for travel and accommodation to carry out this action as the Commission will not provide any additional finances.

The contractor will carry out its tasks under the contract in close cooperation with Commission services.

The contractor needs to put in place an adequate structure in order to coordinate and manage the network and to convey the requests from the Commission/the output from the experts to the respective addressees. The Commission does not expect that all Member States, acceding countries, candidate countries and possible 3rd countries are represented by a separate expert, but it would expect that the quality of work of expert is ensured either by a permanent external quality control mechanism or by a small group of senior experts with a proven track record in this field. The contractor will verify the source of information provided by its experts and ensure a thorough quality check of any material provided or service rendered.

The contractor will be responsible for the organization of the seminar/workshops.

The contractor must set-up/adapt an accessible online platform for the work of the network.

6. Professional qualifications required

See Annex IV of the draft contract, experts' CVs.

Any replacement of experts during the period covered by the contract has to be submitted as a preliminary to the European Commission for agreement.

In line with point 3.5 of this document the contractor must as a matter of priority involve senior experts from universities/research institutes. These should have a distinct track record and could be distinguished i.e. in the field of disabilities, economics, business administration, research, public administration, social studies, political science, or similar. The expert network could also comprise some practitioners, such as e.g. human resources managers, teachers, urban managers, rehabilitation experts, media people provided that they have a strong and well established specific expertise in the field of disability.

As regard participation of people with disabilities, they should represent well established and recognised organisations of people with disabilities or organisations representing people with disabilities. The contractor is invited to involve experts not only from the EU, acceding and candidate countries but also from 3rd countries. A proper gender balance must be ensured.

7. Time schedule and reporting

See Article I.2. of the contract.

7 1. General Conditions

1. As a matter of principle, with a view to favouring appropriate monitoring and valorisation by the European Commission of all results obtained and outputs delivered under PROGRESS programme, the Contractor will be required to provide for each of the tasks required under the present Call:

- Presentation of their key points in one page. Key points should be concise, sharp and easily understandable. They shall be provided in English, French and German. Other Community languages would be welcome even if not compulsory.
- Unless, otherwise more precisely prescribed in the section "tasks to be carried out", an executive summary in 5/6 pages and in English, French and German.

2. In accordance with the General conditions, the Contractor is under the obligation to acknowledge that the present service is delivered on behalf of the Community in all documents and media produced, in particular final delivered outputs, related reports, brochures, press releases, videos, software, etc, including at conferences or seminars, as follows:

This (publication, conference, training session) is supported by the European Community Programme for Employment and Social Solidarity (2007-2013). This programme was established to financially support the

implementation of the objectives of the European Union in the employment and social affairs area, as set out in the Social Agenda, and thereby contribute to the achievement of the Lisbon Strategy goals in these fields.

The seven-year Programme targets all stakeholders who can help shape the development of appropriate and effective employment and social legislation and policies, across the EU-27, EFTA and EU candidate and pre-candidate countries.

For more information see:

http://ec.europa.eu/employment_social/progress/index_en.html

For publications it is also necessary to include the following reference: "The information contained in this publication does not necessarily reflect the position or opinion of the European Commission"

With regard to publication and any communication plan linked to the present service, the Contractor will insert the European Union logo, and any other logo developed for the employment and social solidarity fields when requested by the European Commission, and mention the European Commission as the Contracting Authority in every publication or related material developed under the present service contract.

"Failure for the contractor to respect these obligations could lead the European Commission to reduce by 5% the final amount to be paid under the present service contract."

7 2. Calendar

The contract is foreseen for a period of 12 months renewable three times on a yearly basis.

7 3. Reports

The contractor will provide the following reports:

- 1 month after contract signature: an inception report
- At Mid term (+/- 6 months): a progress interim report with the main activities undertaken as well as the plan for the coming months, Any expected Commission participation and exchange of information should be announced 1 month in advance.
- 1 Month before the end of the contract: a draft Final evaluation report and annexes and Brief publishable report
- End of the contract: Final evaluation report and final publishable report as well as the online versions of these reports and accompanying accessible web site. The Final publishable report should be provided in English, French and German.

8. **Payments and standard contract**

In drawing up the bid, the tenderer should take into account the provisions of the standard contract comprising the "General terms and conditions applicable to service contracts".

Payments will be made on receipt of the corresponding invoices, according to the following schedule:

▪ Pre financing

Following signature of the Contract by the last contracting party, within 30 days of the receipt by the Commission of a request for pre-financing with a relevant invoice, a pre-financing payment equal to 20% of the total amount referred to in Article I.3.1 of the contract shall be made.

▪ Interim Payment

Requests for interim payment by the Contractor shall be admissible if accompanied by:

- an interim technical report in accordance with the instructions laid down in Annex I of the contract,
- the relevant invoices,
- statements of reimbursable expenses in accordance with Article II.7 of the contract,

provided the report has been approved by the Commission.

The Commission shall have 45 days from receipt to approve or reject the report, and the Contractor shall have 30 days in which to submit additional information or a new report.

Within 30 days of the date on which the report is approved by the Commission, an interim payment corresponding to the relevant invoices, up to maximum 60% of the total amount referred to in Article I.3.1 of the contract shall be made.

▪ Payment of the balance

The request for payment of the balance of the Contractor shall be admissible if accompanied by:

- the final technical report in accordance with the instructions laid down in Annex I of the contract,
 - the relevant invoices,
 - statements of reimbursable expenses in accordance with Article II.7 of the contract,
- provided the report has been approved by the Commission.

The Commission shall have 45 days from receipt to approve or reject the report, and the Contractor shall have 30 days in which to submit additional information or a new report.

Within 30 days of the date on which the report is approved by the Commission, payment of the balance of the total amount referred to in Article I.3.1 of the contract shall be made.

9. Prices

Under the terms of Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, the latter are exempt from all charges, taxes and duties, including value added tax; such charges may not therefore be included in the calculation of the price quoted. The amount of VAT is to be indicated separately.

The price must be stated in EUR(€), net of VAT (using, where appropriate, the conversion rates published in the C series of the Official Journal of the European Union on the day when the invitation to tender was issued), and broken down according to the model in Annex III included in the attached standard contract.

Prices must be fixed amounts, and will be firm and final.

The maximum amount available for this contract is **€ 500.000** per year. A similar amount of **€ 500.000** is foreseen for each yearly renewal, in line with point 7.2 of this document and subject to budget availability. No price revisions will be accepted during the full duration of the contract. Tenderers should note that any bids exceeding this limit will not be considered.

Part A: Professional fees and direct costs

- Fees, expressed as the number of person-days multiplied by the unit price per working day for each expert proposed. The unit price should cover the experts' fees and administrative expenditure.
- Other direct costs (please specify in detail).
 - Any translation expenses
 - Travel expenses
 - Subsistence expenses of the contractor and his staff or other people involved in the work (covering the expenditure incurred by experts on short-term trips outside their normal place of work).
 - Expenses for the shipment of equipment or unaccompanied luggage, directly connected with performance of the tasks specified in Article I.1 of this contract.

Part B: Reimbursable expenses

- The section "Reimbursable expenses" heading will only take up again the expenses related to the travel and accommodation of the contractor's personnel to attend a meeting upon specific request of the Commission and non-anticipated in Part A.

Contingencies

Provision for unforeseen events. The reserve can be envisaged to 5% maximum of the total of the part A. However, the contingency reserves can be used only with the prior agreement of the European Commission, by means of a written note permitting the reassignment of all or part of this reserve with one or more of the Headings of the part A.

The total price (Maximum € 500.000) = Part A + Part B

10. Groupings of economic operators or consortia

Tenders can be submitted by groupings of service providers/suppliers who will not be required to adopt a particular legal form prior to the contract being awarded, but the consortium selected may be required to assume a given legal form when it has been awarded the contract if this change is necessary for proper performance of

the contract³. However, a grouping of economic operators must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination. The documents required and listed in the following points 11 and 12 must be supplied by every member of the grouping.

Each member of the grouping assumes a joint and several liability towards the Commission.

11. Exclusion criteria and supporting documents

1) Bidders must provide a declaration on their honour, duly signed and dated, that they are not in one of the situations referred to in Articles 93 and 94 a) of the Financial Regulation.

Those articles are as follows:

Article 93:

Applicants or tenderers shall be excluded if:

- a) *they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;*
- b) *they have been convicted of an offence concerning their professional conduct by a judgement which has the force of res judicata;*
- c) *they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;*
- d) *they have not fulfilled their obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;*
- e) *they have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;*
- f) *following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.*

Article 94 :

Contracts may not be awarded to candidates or tenderers who, during the procurement procedure:

- a) *are subject to a conflict of interest;*

2) The tenderer to whom the contract is to be awarded shall provide, within a time limit defined by the contracting authority and preceding the signature of the contract, the evidence referred to in Article 134 of the implementing Rules, confirming the declaration referred to in point 1 above.

Article 134 of the Implementation Arrangements – Supporting documents

1. The contracting authority shall accept, as satisfactory evidence that the candidate or tenderer is not in one of the situations described in points (a), (b) or (e) of Article 93 of the Financial Regulations, production of a recent extract from the judicial record or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that these requirements are met.

2. The contracting authority shall accept, as satisfactory evidence that the candidate or tenderer is not in the situation described in point (d) of Article 93 of the Financial Regulations, a recent certificate issued by the competent authority of the State concerned.

³ These entities can take the form of an entity with or without legal personality but offering sufficient protection of the Commission's contractual interests (depending on the Member State concerned, this may be, for example, a consortium or a temporary association).

The contract has to be signed by all members of the group, or by one of the members, which has been duly authorised by the other members of the grouping (a power of attorney or sufficient authorisation is to be attached to the contract), when the tenderers have not formed a legal entity.

Where no such document or certificate is issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

3. Depending on the national legislation of the country in which the tenderer or applicant is established, the documents referred to in paragraphs 1 and 2 above shall relate to legal entities and/or physical persons, including, where considered necessary by the awarding authority, company directors or any person with powers of representation, decision-making or control in relation to the tenderer.

See Annex I (which may be used as a checklist) for the supporting documents accepted by the European Commission to be provided by applicants, tenderers or tenderers to who the contract will be awarded.

3) The contracting authority may waive the obligation of a candidate or tenderer to submit the documentary evidence referred to in Article 134 of the Implementing Rules, if such evidence has already been submitted to it for the purposes of another procurement procedure launched by DG EMPL and provided that the issuing date of the documents does not exceed one year and that they are still valid.

In such a case, the candidate or tenderer shall declare on his honour that the documentary evidence has already been provided in a previous procurement procedure and confirm that no changes in his situation have occurred.

12. Selection criteria

Economic and financial capacity to carry out the tasks set out in the tender specifications must be demonstrated as follows:

A) Economic and financial capacity:

- the tenderer must provide proof of turnover in the last financial year at least equivalent to 100% of the proposed price of the contract;
- balance sheets from the last two financial years, where publication of the balance sheets is required under company law in the country in which the service provider is established;
- if the tenderer cannot provide these documents, his bid must be accompanied by evidence that there is no legal obligation to annually publish the turnover and/or the balance sheet. In this case, a bank declaration providing evidence of good financial standing of the tenderer may be accepted by the contracting authority.

Technical capacity to carry out the tasks set out in the tender specifications must be demonstrated as follows:

B) Technical capacity for carrying out the evaluation, to be demonstrated by:

- Co-ordination and administrative tasks: at least five years experience of managing pan-European projects and coordinating multi-national teams of researchers;
- Sectoral expertise: as a minimum requirement, the team will have to include:
 - Mix of senior experts with at least 10 years experience and more junior experts with 3 to 5 years experience, preferably of an academic nature, on issues related to disabilities, and socioeconomic and/or employment issues;
 - Some experts with at least five years of proven record of working with policy makers and opinion leaders;
 - A number of practitioners with direct experience of applied disability policies;
 - People with disabilities that are, representative of organisations of people with disabilities, or organisations representing people with disabilities, and that have a good track record of working at EU level, knowledge and experience of analysis of disability issues as well as of disability policies.
 - Ability to call on the necessary expertise covering all EU Member States, as well as acceding and candidate countries, in order to fulfil the tasks – see section 5 of the terms of reference
 - Experience of working with the European Commission and/or other international organizations;
 - Relevant experience with the coordination and organization of international workshops and seminars;
 - Relevant experience with the drafting of reports for a pan-European audience (on the basis of results elaborated in the workshops);

- Sufficient knowledge of the relevant EU working languages, in order to facilitate communication with the Commission and other relevant actors.

The professional capacity to carry out the tasks set out in the tender specifications must be demonstrated as follows:

C) Professional capacity:

The skills needed for this contract are as follows:

- good experience in analysing issues and policies related to the field to be addressed , as attested by the CVs of the experts proposed;
- language skills to cover the languages requested to perform the analysis in the participating countries;
- a list of co-ordinator(s) and experts to be used, together with their CVs and qualifications ;
- a declaration by the co-ordinator certifying the competence of the team to carry out the project including linguistic capabilities;
- in the case of tenders from consortia: clear identification of the co-ordinator of the work who will also be responsible for signing the contract, and written confirmation from each member of the consortium briefly describing their role;
- proof of enrolment in one of the professional trade registers or a declaration or certificate, as prescribed in the legislation of the country in which the tenderer is located.

13. Award criteria

The contract will be awarded to the bid offering the best price/quality ratio, taking account of the following criteria and total price.

1)	<u>Understanding of the objectives and tasks required</u>	30 %
	<ul style="list-style-type: none"> A. <i>Quality of the understanding of the nature of the assignment, its context and the results to be achieved</i> B. <i>Credibility (identification of logical and rigorous analytical and causal links), control (identification of challenges and appropriate response), and understanding of the tasks to be carried out (see part 3.4 2 – “Objectives of the network”).</i> 	
2)	<u>Methodology</u>	40 %
	<ul style="list-style-type: none"> A. <i>Clarity, credibility, quality and feasibility of the proposal (i.e. project description, and functionality of the approach)</i> B. <i>Soundness and appropriateness of the proposed analysis tools and techniques</i> C. <i>Completeness of the methodology to cover all aspects of the network</i> D. <i>Effectiveness of the methodological approach" to identify existing or best needed indicators to capture current or emerging evolutions in research relating to disability issues</i> E. <i>Relevance and consistency of the analytical approach to key policies relevant for people with disabilities</i> 	
3)	<u>Project management:</u>	30 %
	<ul style="list-style-type: none"> A. <i>Work plan and organisation of the work, including the administrative and logistical tasks involved as well as the feasibility of the time schedule proposed</i> B. <i>Quality of the network based on the team composition</i> C. <i>Soundness of resources and expertise allocation, including structure of the team with regards to the identification and distribution of tasks</i> 	

Minimum attainment per criterion

Offers scoring **less than 50%** for any criterion will be deemed to be of insufficient quality and eliminated from further consideration.

Minimum attainment overall

Please note that the contract will not be awarded to any bid that receives **less than 70 %** in the award criteria.

The points total will then be divided by the price, with the highest-scoring bid being chosen.

Since assessment of the tenders will focus on the quality of the proposed solution, tenders should elaborate on all points addressed by tender specifications in order to score as many points as possible. The mere repetition of mandatory requirements set out in these specifications, without going into details or without giving any added value, will only result in a very low score. In addition, if the tender does not expressly cover certain essential points of these specifications, this weakness will also result in a very low score.

14. Content and presentation of bids

14.1. Content of bids

Tenders must include:

- A signed and dated letter of introduction;
- The tenderer's name, full address, telephone and fax numbers and e-mail address;
- The name and function of the Contractor's legal representative (person authorised to act on behalf of the Contractor in any legal dealings with third parties);
- all information and documents necessary to enable the Commission to appraise the bid on the basis of the selection and award criteria (see points 12 and 13 above) and taking into account the exclusion criteria (see point 11 above);
- Detailed information on the work programme as described in points 5 and 13 above;
- a "legal entity" form duly completed;
- The full statutes, which must also demonstrate proof of eligibility; tenderers must indicate the State in which they have their headquarters and must provide the evidence required under their national law;
- VAT number or proof of exemption;
- a bank ID form duly completed and signed by the bank;
- The details of the price proposed, presented in accordance with point 9 above
- Documents demonstrating economic and financial capacity as specified in point 12 above

14.2. Presentation of bids

- Bids must be submitted in triplicate (i.e. one original and two copies).
- Bids must include all the information required by the Commission (see points 9, 10, 11 and 12 above).
- Bids must be clear and concise.
- Bids must be signed by the legal representative. **Unsigned bids will be rejected.**
- Bids must be submitted in accordance with the specific requirements of the invitation to tender, within the deadlines laid down.