



## EUROPEAN COMMISSION

Employment, Social Affairs and Equal Opportunities DG

Employment, Lisbon Strategy, International Affairs  
**Employment Services, Mobility**

---

### Study Service Contract

---

*Contract title* **Anticipating skill needs of the labour force and equipping people for new jobs. Which role for Public Employment Services in early identification of skill needs and labour up-skilling?**

*Contract reference No* **VC/2008/0571**  
The above title and reference No **must** be quoted in **all** correspondence with the Commission.

*Contractor* .....  
.....

#### Other administrative information

*Department* **DG EMPL/D/3**

*Prior information* O.J. ref. No of notice publication: .....

*Call for tender* DG EMPL ref. No: VT/2008/031 of .....

*Tender information* O.J. ref. No of notice publication: .....

*EPIC* Record No: ...../...../.....

*Databases* SMART record No: .....

*Service category* No: .....

#### Other accounting information

*Commitment No* **SI2. ....**  
This commitment No **must** be quoted in correspondence relating to **invoices / payments.**

*Type of Contract* V/SE/STUSEC02

The European Community (hereinafter referred to as “**the Community**”),  
represented by the Commission of the European Communities (hereinafter referred to as “**the Commission**”),  
which is represented for the purposes of the signature of this Contract by Wallis GOELEN,  
Head of Unit - EMPL/D/3, Employment, Social Affairs and Equal Opportunities DG,

on the one part,

AND

.....(*official name in full*),  
registered legal form: .....,  
statutory registration number: .....,  
official address in full: .....,  
VAT registration number: .....,  
(hereinafter referred to as “**the Contractor**”),  
represented for the purposes of the signature and management of the present Contract by  
.....(*forename and name in full*), .....(*function*),

of the other part,

HAVE AGREED

the Special Conditions and the General Conditions below and the following Annexes:

- **Annex I** Tender Specifications (Invitation to Tender No. VT/2008/031 of ..... ) and Monitoring
- **Annex II** Contractor's Tender (Registre CAD Ref. No. .... of .....
- **Annex III** Breakdown of prices
- **Annex IV** CVs and classification of experts
- **Annex V** Fiscal provisions regarding invoicing by the Contractor

which forms an integral part of this Contract (hereinafter referred to as “**the Contract**”).

The terms set out in the Special Conditions shall take precedence over those in the other parts of the Contract. The terms set out in the General Conditions shall take precedence over those in the Annexes. The terms set out in the Tender Specifications (Annex I) and in the Breakdown of prices (Annex III) shall take precedence over those in the Tender (Annex II).

Subject to the above, the several instruments forming part of this Contract are to be taken as mutually explanatory. Ambiguities or discrepancies within or between such parts shall be explained or rectified by a written instruction issued by the Commission, subject to the rights of the Contractor under Article I.7 should he dispute any such instruction.

---

## I. **Special conditions**

---

### Article I.1 **Subject**

**I.1.1.** The subject of the Contract is the following study: **Anticipating skill needs of the labour force and equipping people for new jobs. Which role for Public Employment Services in early identification of skill needs and labour up-skilling?**

**I.1.2.** The Contractor shall execute the tasks assigned to him in accordance with the Tender Specifications annexed to the Contract (Annex I).

### Article I.2 **Duration**

**I.2.1.** The Contract shall enter into force on the date on which it is signed by the last contracting party. The date of signature of the present Contract is that of the date stamp applied by the postal services of Employment, Social Affairs and Equal Opportunities DG on the title page of the present Contract after it has been signed by both parties.

**I.2.2.** Execution of the tasks may under no circumstances begin before the date on which the Contract enters into force.

**I.2.3.** The duration of the tasks shall not exceed 18 months. This period and all other periods specified in the Contract are calculated in calendar days. Execution of the tasks shall start from the date of entry into force of the Contract. The period of execution of the tasks may be extended only with the express written agreement of the parties before such period elapses.

The Commission is not obliged to react to any request for extension of the duration of the tasks received less than 30 days before expiry of the period of execution or with less than one third of the period of execution left to run, whichever period is the shorter.

### Article I.3 **Contract price**

#### **I.3.1. *Maximum total amount***

The maximum total amount to be paid by the Commission under the Contract shall be EUR ..... (*amount in figures*) covering all tasks executed.

#### **I.3.2. *Price revisions***

Not applicable.

#### **I.3.3. *Travel, subsistence and shipment expenses***

In addition to the total amount specified in Article I.3.1, travel, subsistence and shipment expenses shall be reimbursed in accordance with Article II.7, as shall other expenses provided for by the Tender Specifications up to a maximum amount of EUR 0.01. The daily subsistence allowance referred to in Article II.7.4(d) shall be determined in accordance with Annex III, 2.2.1.

### Article I.4 **Payment periods and formalities**

Payments under the Contract shall be made in accordance with Article II.4. Payments shall be executed only if the Contractor has fulfilled all his contractual obligations by the date on which the invoice is submitted. Payment requests may not be made if payments for previous periods have not been executed as a result of default or negligence on the part of the Contractor.

#### **I.4.1. 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 30% of the total amount referred to in Article I.3.1 shall be made.

#### **I.4.2. 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,
- the relevant invoices,
- statements of reimbursable expenses in accordance with Article II.7,

provided the report has been approved by the Commission.

The Commission shall have 60 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 40% of the total amount referred to in Article I.3.1, shall be made.

#### **I.4.3. 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,
- the relevant invoices,
- statements of reimbursable expenses in accordance with Article II.7,

provided the report has been approved by the Commission.

The Commission shall have 60 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 shall be made.

#### **I.4.4. Performance guarantee**

Not applicable.

### **Article I.5 Bank account**

Payments shall be made to the Contractor's bank account denominated in euro <sup>1</sup>, identified <sup>2</sup> as follows:

- Name of bank: .....
- Address of branch in full: .....
- Exact designation of account holder: .....
- Full account number including codes: .....
- IBAN or, if non available, BIC code: —

### **Article I.6 General administrative provisions**

Any communication relating to the Contract shall be made in writing and shall bear the Contract number. Ordinary mail shall be deemed to have been received by the Commission on the date on which it is registered by the department responsible indicated below. Communications shall be sent to the following addresses:

<sup>1</sup> Or local currency where the receiving country does not allow transactions in EUR.

<sup>2</sup> By a document issued or certified by the bank.

**Commission**

European Commission  
Directorate-General Employment, Social Affairs and Equal Opportunities  
EMPL/D/3  
B-1049 Brussels (Belgium)

**Contractor**

..... (Mr/Mrs/Ms + forename and name)  
..... (function)  
..... (company name)  
..... (official address in full)

**Article I.7 Applicable law and settlement of disputes**

**I.7.1.** The Contract shall be governed by the national substantive law of Belgium.

**I.7.2.** Any dispute between the parties resulting from the interpretation or application of the Contract which cannot be settled amicably shall be brought before the courts of Brussels.

**Article I.8 Other special conditions****Definition of the term “payment request” regarding the interests for late payments**

It is understood that a payment request, as mentioned in Article II.5.3, will only be considered as complete, if all specific documents mentioned in Article I.4; are joined to this request. If these specific documents are not sent to the Commission all together with the payment request, the 60 days shall only run from the date of the first registered receipt of the last document, making the payment request complete. As regards payments subject to the prior approval of a report (or to the signature of a certificate of final acceptance for supplies delivery) by the Commission, according to Article I.4, the period of 60 calendar days shall start only on the date when both the complete payment request has been registered and the report has been approved (or the certificate of final acceptance has been signed) by the Commission, provided the Commission has itself respected the time limits set in the present Contract and its annexes for such approvals.

**Data protection**

Any personal data included in the Contract shall be processed pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data. It shall be processed solely for the purposes of the performance, management and follow-up of the Contract by Employment, Social Affairs and Equal Opportunities DG without prejudice to possible transmission to the bodies charged with a monitoring or inspection task in conformity with Community law. The Contractor shall have the right of access to his personal data and the right to rectify any such data that is inaccurate or incomplete. Should the Contractor have any queries concerning the processing of his personal data, he shall address them to Employment, Social Affairs and Equal Opportunities DG. The Contractor shall have right of recourse at any time to the European Data Protection Supervisor.

---

## **II. General conditions**

---

### **Article II.1 Performance of the Contract**

**II.1.1.** The Contractor shall perform the Contract to the highest professional standards. The Contractor shall have sole responsibility for complying with any legal obligations incumbent on him, notably those resulting from employment, tax and social legislation.

**II.1.2.** The Contractor shall have sole responsibility for taking the necessary steps to obtain any permit or licence required for performance of the Contract under the laws and regulations in force at the place where the tasks assigned to him are to be executed.

**II.1.3.** Without prejudice to Article II.3 any reference made to the Contractor's staff in the Contract shall relate exclusively to individuals involved in the performance of the Contract.

**II.1.4.** The Contractor must ensure that any staff performing the Contract have the professional qualifications and experience required for the execution of the tasks assigned to him.

**II.1.5.** The Contractor shall neither represent the Commission nor behave in any way that would give such an impression. The Contractor shall inform third parties that he does not belong to the European public service.

**II.1.6.** The Contractor shall have sole responsibility for the staff who execute the tasks assigned to him.

The Contractor shall make provision for the following employment or service relationships with his staff:

- staff executing the tasks assigned to the Contractor may not be given orders direct by the Commission;
- the Commission may not under any circumstances be considered to be the staff's employer and the said staff shall undertake not to invoke in respect of the Commission any right arising from the contractual relationship between the Commission and the Contractor.

**II.1.7.** In the event of disruption resulting from the action of a member of the Contractor's staff working on Commission premises or in the event of the expertise of a member of the Contractor's staff failing to correspond to the profile required by the Contract, the Contractor shall replace him without delay. The Commission shall have the right to request the replacement of any such member of staff, stating its reasons for so doing. Replacement staff must have the necessary qualifications and be capable of performing the Contract under the same contractual conditions. The Contractor shall be responsible for any delay in the execution of the tasks assigned to him resulting from the replacement of staff in accordance with this Article.

**II.1.8.** Should any unforeseen event, action or omission directly or indirectly hamper execution of the tasks, either partially or totally, the Contractor shall immediately and on his own initiative record it and report it to the Commission. The report shall include a description of the problem and an indication of the date on which it started and of the remedial action taken by the Contractor to ensure full compliance with his obligations under the Contract. In such event the Contractor shall give priority to solving the problem rather than determining liability.

**II.1.9.** Should the Contractor fail to perform his obligations under the Contract in accordance with the provisions laid down therein, the Commission may - without prejudice to its right to terminate the Contract - reduce or recover payments in proportion to the scale of the failure. In addition, the Commission may impose penalties or liquidated damages provided for in Article II.16.

## Article II.2 Liability

**II.2.1.** The Commission shall not be liable for damage sustained by the Contractor in performance of the Contract except in the event of wilful misconduct or gross negligence on the part of the Commission.

**II.2.2.** The Contractor shall be liable for any loss or damage caused by himself in performance of the Contract, including in the event of subcontracting under Article II.13. The Commission shall not be liable for any act or default on the part of the Contractor in performance of the Contract.

**II.2.3.** The Contractor shall provide compensation in the event of any action, claim or proceeding brought against the Commission by a third party as a result of damage caused by the Contractor in performance of the Contract.

**II.2.4.** In the event of any action brought by a third party against the Commission in connection with performance of the Contract, the Contractor shall assist the Commission. Expenditure incurred by the Contractor to this end may be borne by the Commission.

**II.2.5.** The Contractor shall take out insurance against risks and damage relating to performance of the Contract if required by the relevant applicable legislation. He shall take out supplementary insurance as reasonably required by standard practice in the industry. A copy of all the relevant insurance contracts shall be sent to the Commission should it so request.

## Article II.3 Conflict of Interests

**II.3.1.** The Contractor shall take all necessary measures to prevent any situation that could compromise the impartial and objective performance of the Contract. Such conflict of interests could arise in particular as a result of economic interest, political or national affinity, family or emotional ties, or any other relevant connection or shared interest. Any conflict of interests which could arise during performance of the Contract must be notified to the Commission in writing without delay. In the event of such conflict, the Contractor shall immediately take all necessary steps to resolve it.

The Commission reserves the right to verify that such measures are adequate and may require additional measures to be taken, if necessary, within a time limit which it shall set. The Contractor shall ensure that his staff, board and directors are not placed in a situation which could give rise to conflict of interests. Without prejudice to Article II.1 the Contractor shall replace, immediately and without compensation from the Commission, any member of his staff exposed to such a situation.

**II.3.2.** The Contractor shall abstain from any contact likely to compromise his independence.

**II.3.3.** The Contractor declares:

- that he has not made and will not make any offer of any type whatsoever from which an advantage can be derived under the Contract,
- that he has not granted and will not grant, has not sought and will not seek, has not attempted and will not attempt to obtain, and has not accepted and will not accept, any advantage, financial or in kind, to or from any party whatsoever, where such advantage constitutes an illegal practice or involves corruption, either directly or indirectly, inasmuch as it is an incentive or reward relating to performance of the Contract.

**II.3.4.** The Contractor shall pass on all the relevant obligations in writing to his staff, board, and directors as well as to third parties involved in performance of the Contract. A copy of the instructions given and the undertakings made in this respect shall be sent to the Commission should it so request.

## Article II.4 Payments

### **II.4.1. Pre-financing**

Where required by Article I.4.1, the Contractor shall provide a financial guarantee in the form of a bank guarantee or equivalent supplied by a bank or an authorised financial institution (guarantor) equal to the amount indicated in the same article to cover pre-financing under the Contract. Such guarantee

may be replaced by a joint and several guarantee by a third party. The guarantor shall pay to the Commission at its request an amount corresponding to payments made by it to the Contractor which have not yet been covered by equivalent work on his part. The guarantor shall stand as first-call guarantor and shall not require the Commission to have recourse against the principal debtor (the Contractor). The guarantee shall specify that it enters into force at the latest on the date on which the Contractor receives the pre-financing. The Commission shall release the guarantor from its obligations as soon as the Contractor has demonstrated that any pre-financing has been covered by equivalent work. The guarantee shall be retained until the pre-financing has been deducted from interim payments or payment of the balance to the Contractor. It shall be released the following month. The cost of providing such guarantee shall be borne by the Contractor.

#### **II.4.2. Interim payment**

At the end of each of the periods indicated in Annex I the Contractor shall submit to the Commission a formal request for payment accompanied by those of the following documents which are provided for in the Special Conditions:

- an interim technical report in accordance with the instructions laid down in Annex I;
- the relevant invoices indicating the reference number of the Contract to which they refer;
- statements of reimbursable expenses in accordance with Article II.7.

If the report is a condition for payment, on receipt the Commission shall have the period of time indicated in the Special Conditions in which:

- to approve it, with or without comments or reservations, or suspend such period and request additional information; or
- to reject it and request a new report.

If the Commission does not react within this period, the report shall be deemed to have been approved. Approval of the report does not imply recognition either of its regularity or of the authenticity, completeness or correctness of the declarations or information enclosed. Where the Commission requests a new report because the one previously submitted has been rejected, this shall be submitted within the period of time indicated in the Special Conditions. The new report shall likewise be subject to the above provisions.

#### **II.4.3. Payment of the balance**

Within sixty days of completion of the tasks referred to in Annex I the Contractor shall submit to the Commission a formal request for payment accompanied by those of the following documents which are provided for in the Special Conditions:

- a final technical report in accordance with the instructions laid down in Annex I;
- the relevant invoices indicating the reference number of the Contract to which they refer;
- statements of reimbursable expenses in accordance with Article II.7.

If the report is a condition for payment, on receipt the Commission shall have the period of time indicated in the Special Conditions in which:

- to approve it, with or without comments or reservations, or suspend such period and request additional information; or
- to reject it and request a new report.

If the Commission does not react within this period, the report shall be deemed to have been approved. Approval of the report does not imply recognition either of its regularity or of the authenticity, completeness or correctness of the declarations and information enclosed. Where the Commission requests a new report because the one previously submitted has been rejected, this shall be submitted within the period of time indicated in the Special Conditions. The new report shall likewise be subject to the above provisions.

## **Article II.5 General Provisions concerning Payments**

**II.5.1.** Payments shall be deemed to have been made on the date on which the Commission's account is debited.

**II.5.2.** The payment periods referred to in Article I.4 may be suspended by the Commission at any time if it informs the Contractor that his payment request is not admissible, either because the amount



is not due or because the necessary supporting documents have not been properly produced. In case of doubt on the eligibility of the expenditure indicated in the payment request, the Commission may suspend the time limit for payment for the purpose of further verification, including an on-the-spot check, in order to ascertain, prior to payment, that the expenditure is eligible.

The Commission shall notify the Contractor accordingly and set out the reasons for the suspension by registered letter with acknowledgment of receipt or equivalent. Suspension shall take effect from the date of dispatch of the letter. The remainder of the period referred to in Article I.4 shall begin to run again once the suspension has been lifted.

**II.5.3.** In the event of late payment the Contractor shall be entitled to interest, provided the calculated interest exceeds EUR 200. In case interest does not exceed EUR 200, the Contractor may claim interest within two months of receiving the payment. Interest shall be calculated at the rate applied by the European Central Bank to its most recent main refinancing operations ("*the reference rate*") plus seven percentage points ("*the margin*"). The reference rate in force on the first day of the month in which the payment is due shall apply. Such interest rate is published in the C series of the Official Journal of the European Union. Interest shall be payable for the period elapsing from the calendar day following expiry of the time limit for payment up to the day of payment. Suspension of payment by the Commission may not be deemed to constitute late payment.

## Article II.6 Recovery

**II.6.1.** If total payments made exceed the amount actually due under the Contract or if recovery is justified in accordance with the terms of the Contract, the Contractor shall reimburse the appropriate amount in euro on receipt of the debit note, in the manner and within the time limits set by the Commission.

**II.6.2.** In the event of failure to pay by the deadline specified in the request for reimbursement, the sum due shall bear interest at the rate indicated in Article II.5.3. Interest shall be payable from the calendar day following the due date up to the calendar day on which the debt is repaid in full.

**II.6.3.** The Commission may, after informing the Contractor, recover amounts established as certain, of a fixed amount and due by offsetting, in cases where the Contractor also has a claim on the Communities that is certain, of a fixed amount and due. The Commission may also claim against the guarantee, where provided for.

## Article II.7 Reimbursements

**II.7.1.** Where provided by the Special Conditions or by Annex I, the Commission shall reimburse the expenses which are directly connected with execution of the tasks on production of original supporting documents, including receipts and used tickets.

**II.7.2.** Travel and subsistence expenses shall be reimbursed, where appropriate, on the basis of the shortest itinerary.

**II.7.3.** Travel expenses shall be reimbursed as follows:

- (a) travel by air shall be reimbursed up to the maximum cost of an economy class ticket at the time of the reservation;
- (b) travel by boat or rail shall be reimbursed up to the maximum cost of a first class ticket;
- (c) travel by car shall be reimbursed at the rate of one first class rail ticket for the same journey and on the same day;
- (d) travel outside Community territory shall be reimbursed under the general conditions stated above provided the Commission has given its prior written agreement.

**II.7.4.** Subsistence expenses shall be reimbursed on the basis of a daily allowance as follows:

- (a) for journeys of less than 200 km (return trip) no subsistence allowance shall be payable;
- (b) daily subsistence allowance shall be payable only on receipt of a supporting document proving that the person concerned was present at the place of destination;

- (c) daily subsistence allowance shall take the form of a flat-rate payment to cover all subsistence expenses, including accommodation, meals, local transport, insurance and sundries;
- (d) daily subsistence allowance, where applicable, shall be reimbursed at the rate specified in Article I.3.3.

**II.7.5.** The cost of shipment of equipment or unaccompanied luggage shall be reimbursed provided the Commission has given prior written authorisation.

## **Article II.8 Ownership of the Results – Intellectual and Industrial Property**

Any results or rights thereon, including copyright and other intellectual or industrial property rights, obtained in performance of the Contract, shall be owned solely by the Community, which may use, publish, assign or transfer them as it sees fit, without geographical or other limitation, except where industrial or intellectual property rights exist prior to the Contract being entered into.

## **Article II.9 Confidentiality**

**II.9.1.** The Contractor undertakes to treat in the strictest confidence and not make use of or divulge to third parties any information or documents which are linked to performance of the Contract. The Contractor shall continue to be bound by this undertaking after completion of the tasks.

**II.9.2.** The Contractor shall obtain from each member of his staff, board and directors an undertaking that they will respect the confidentiality of any information which is linked, directly or indirectly, to execution of the tasks and that they will not divulge to third parties or use for their own benefit or that of any third party any document or information not available publicly, even after completion of the tasks.

## **Article II.10 Use, Distribution and Publication of Information**

**II.10.1.** The Contractor shall authorise the Commission to process, use, distribute and publish, for whatever purpose, by whatever means and on whatever medium, any data contained in or relating to the Contract, in particular the identity of the Contractor, the subject matter, the duration, the amount paid and the reports. Where personal data is concerned, Article I.8 shall apply.

**II.10.2.** Unless otherwise provided by the Special Conditions, the Commission shall not be required to distribute or publish documents or information supplied in performance of the Contract. If it decides not to publish the documents or information supplied, the Contractor may not have them distributed or published elsewhere without prior written authorisation from the Commission.

**II.10.3.** Any distribution or publication of information relating to the Contract by the Contractor shall require prior written authorisation from the Commission and shall mention the amount paid by the Community. It shall state that the opinions expressed are those of the Contractor only and do not represent the Commission's official position.

**II.10.4.** The use of information obtained by the Contractor in the course of the Contract for purposes other than its performance shall be forbidden, unless the Commission has specifically given prior written authorisation to the contrary.

## **Article II. 11 Taxation**

**II.11.1.** The Contractor shall have sole responsibility for compliance with the tax laws which apply to him. Failure to comply shall make the relevant invoices invalid.

**II.11.2.** The Contractor recognises that the Commission is, as a rule, exempt from all taxes and duties, including value added tax (VAT), pursuant to the provisions of Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities.

**II.11.3.** The Contractor shall accordingly complete the necessary formalities with the relevant authorities to ensure that the goods and services required for performance of the Contract are exempt from taxes and duties, including VAT.

**II.11.4.** Invoices presented by the Contractor shall indicate his place of taxation for VAT purposes and shall specify separately the amounts not including VAT and the amounts including VAT.

## Article II.12 **Force Majeure**

**II.12.1.** *Force majeure* shall mean any unforeseeable and exceptional situation or event beyond the control of the contracting parties which prevents either of them from performing any of their obligations under the Contract, was not due to error or negligence on their part or on the part of a subcontractor, and could not have been avoided by the exercise of due diligence. Defects in equipment or material or delays in making it available, labour disputes, strikes or financial problems cannot be invoked as *force majeure* unless they stem directly from a relevant case of *force majeure*.

**II.12.2.** Without prejudice to the provisions of Article II.1.8, if either contracting party is faced with *force majeure*, it shall notify the other party without delay by registered letter with acknowledgment of receipt or equivalent, stating the nature, likely duration and foreseeable effects.

**II.12.3.** Neither contracting party shall be held in breach of its contractual obligations if it has been prevented from performing them by *force majeure*. Where the Contractor is unable to perform his contractual obligations owing to *force majeure*, he shall have the right to remuneration only for tasks actually executed.

**II.12.4.** The contracting parties shall take the necessary measures to reduce damage to a minimum.

## Article II.13 **Subcontracting**

**II.13.1.** The Contractor shall not subcontract without prior written authorisation from the Commission nor cause the Contract to be performed in fact by third parties.

**II.13.2.** Even where the Commission authorises the Contractor to subcontract to third parties, he shall none the less remain bound by his obligations to the Commission under the Contract and shall bear exclusive liability for proper performance of the Contract.

**II.13.3.** The Contractor shall make sure that the subcontract does not affect rights and guarantees to which the Commission is entitled by virtue of the Contract, notably Article II.17.

## Article II.14 **Assignment**

**II.14.1.** The Contractor shall not assign the rights and obligations arising from the Contract, in whole or in part, without prior written authorisation from the Commission.

**II.14.2.** In the absence of the authorisation referred to in 1 above, or in the event of failure to observe the terms thereof, assignment by the Contractor shall not be enforceable against and shall have no effect on the Commission.

## Article II.15 **Termination by the Commission**

**II.15.1.** The Commission may terminate the Contract in the following circumstances:

- (a) where the Contractor is being wound up, is having his affairs administered by the courts, has entered into an arrangement with creditors, has suspended business activities, is the subject

- of proceedings concerning those matters, or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- (b) where the Contractor has been convicted of an offence concerning his professional conduct by a judgment which has the force of *res judicata*;
  - (c) where the Contractor has been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
  - (d) where the Contractor has not fulfilled 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 he is established or with those of the country applicable to the Contract or those of the country where the Contract is to be performed;
  - (e) where the Commission seriously suspects the Contractor of fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
  - (f) where the Contractor is in breach of his obligations under Article II.3;
  - (g) where the Contractor was guilty of misrepresentation in supplying the information required by the Commission as a condition of participation in the Contract procedure or failed to supply this information;
  - (h) where a change in the Contractor's legal, financial, technical or organisational situation could, in the Commission's opinion, have a significant effect on the performance of the Contract;
  - (i) where execution of the tasks has not actually commenced within three months of the date foreseen, and the new date proposed, if any, is considered unacceptable by the Commission;
  - (j) where the Contractor is unable, through his own fault, to obtain any permit or licence required for performance of the Contract;
  - (k) where the Contractor, after receiving formal notice in writing to comply, specifying the nature of the alleged failure, and after being given the opportunity to remedy the failure within a reasonable period following receipt of the formal notice, remains in serious breach of his contractual obligations.

**II.15.2.** In case of *force majeure*, notified in accordance with Article II.12, either contracting party may terminate the Contract, where performance thereof cannot be ensured for a period corresponding to at least to one fifth of the period laid down in Article I.2.3.

**II.15.3.** Prior to termination under point e), h) or k), the Contractor shall be given the opportunity to submit his observations.

Termination shall take effect on the date on which a registered letter with acknowledgment of receipt terminating the Contract is received by the Contractor, or on any other date indicated in the letter of termination.

#### **II.15.4. Consequences of termination**

In the event of the Commission terminating the Contract in accordance with this article and without prejudice to any other measures provided for in the Contract, the Contractor shall waive any claim for consequential damages, including any loss of anticipated profits for uncompleted work. On receipt of the letter terminating the Contract, the Contractor shall take all appropriate measures to minimise costs, prevent damage, and cancel or reduce his commitments. He shall draw up the documents required by the Special Conditions for the tasks executed up to the date on which termination takes effect, within a period not exceeding sixty days from that date.

The Commission may claim compensation for any damage suffered and recover any sums paid to the Contractor under the Contract.

On termination the Commission may engage any other contractor to complete the services. The Commission shall be entitled to claim from the Contractor all extra costs incurred in making good and completing the services, without prejudice to any other rights or guarantees it has under the Contract.

## **Article II.16 Liquidated Damages**

Should the Contractor fail to perform his obligations under the Contract within the time limits set by the Contract, then, without prejudice to the Contractor's actual or potential liability incurred in relation to the Contract or to the Commission's right to terminate the Contract, the Commission may decide to

impose liquidated damages of 0.2% of the amount specified in Article I.3.1 per calendar day of delay. The Contractor may submit arguments against this decision within thirty days of notification by registered letter with acknowledgement of receipt or equivalent. In the absence of reaction on his part or of written withdrawal by the Commission within thirty days of the receipt of such arguments, the decision imposing the liquidated damages shall become enforceable. These liquidated damages shall not be imposed where there is provision for interest for late completion. The Commission and the Contractor expressly acknowledge and agree that any sums payable under this article are in the nature of liquidated damages and not penalties, and represent a reasonable estimate of fair compensation for the losses that may be reasonably anticipated from such failure to perform obligations.

## **Article II.17 Checks and Audits**

**II.17.1.** Pursuant to Article 142 of the Financial Regulation applicable to the general budget of the European Communities, the European Court of Auditors shall be empowered to audit the documents held by the natural or legal persons receiving payments from the budget of the European Communities from signature of the Contract up to five years after payment of the balance.

**II.17.2.** The Commission or an outside body of its choice shall have the same rights as the European Court of Auditors for the purpose of checks and audits limited to compliance with contractual obligations from signature of the Contract up to five years after payment of the balance.

**II.17.3.** In addition, the European Anti Fraud Office may carry out on-the-spot checks and inspections in accordance with Council Regulation (Euratom, EC) No 2185/96 and Parliament and Council Regulation (EC) No 1073/1999 from signature of the Contract up to five years after payment of the balance.

## **Article II.18 Amendments**

Any amendment to the Contract shall be the subject of a written agreement concluded by the contracting parties. An oral agreement shall not be binding on the contracting parties.

## **Article II.19 Suspension of the Contract**

Without prejudice to the Commission's right to terminate the Contract, the Commission may at any time and for any reason suspend execution of the tasks under the Contract or any part thereof. Suspension shall take effect on the day the Contractor receives notification by registered letter with acknowledgement of receipt or equivalent, or at a later date where the notification so provides. The Commission may at any time following suspension give notice to the Contractor to resume the work suspended. The Contractor shall not be entitled to claim compensation on account of suspension of the Contract or of part thereof.

**Signatures**

1. For the Contractor,  
..... (forename and name)  
..... (position)  
..... (company name)

2. For the Commission,  
Wallis GOELEN  
Head of Unit - EMPL/D/3  
Employment, Social Affairs and Equal  
Opportunities DG

Done at ..... (place), Done at Brussels,  
..... (date) ..... (date)

In duplicate in English.



---

# Tender Specifications and Monitoring

ANNEX I Tender No. VT/2008/031 of .....

---

## 1. Background

### 1. PROGRESS INTRODUCTION

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.

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 and published in the OJ on 15 November 2006.

PROGRESS 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. PROGRESS mission is to strengthen the EU contribution in support of Member States' commitments and efforts to create more and better jobs and to build a more cohesive society. To that effect, PROGRESS will be instrumental in:

- providing analysis and policy advice on PROGRESS policy areas;
- monitoring and reporting on the implementation of EU legislation and policies in PROGRESS policy areas;
- promoting policy transfer, learning and support among Member States on EU objectives and priorities; and
- relaying the views of the stakeholders and society at large.

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).

The present Call for tenders is issued in the context of the implementation of the 2008 annual work plan: [http://ec.europa.eu/employment\\_social/progress/annwork\\_en.htm](http://ec.europa.eu/employment_social/progress/annwork_en.htm)

## 2. BACKGROUND ON PUBLIC EMPLOYMENT SERVICES AND NEW SKILLS FOR NEW JOBS

### The role of PES in the European Employment Strategy

The Mission Statement for PES adopted by the Directors General of the PES in the EU/EEA area in December 2006<sup>3</sup>, highlights the importance of developing a culture of "labour upskilling" in a globalised context which presents challenges (the ageing population and the need to enlarge workforce by bringing back to work inactive people, so as to reduce inactivity rate and increase employment rate), but also creates new opportunities and new markets.

PES are one of the most important source of assistance to the jobseekers who experience the greatest difficulties in finding a job. The PES play a central role in the European Employment Strategy, in terms of developing service models that are capable to offer a new start to all jobseekers before they reach 6 (youth) or 12 (adults) months of unemployment. These new starts should be a real first step towards effective reintegration into the labour market and possible prevention of long-term unemployment (LTU) at a time of growing labour market shortages/mismatches and as a major cause of social exclusion.

More specifically, PES' modernisation efforts over the past years have made a substantial contribution to the progress achieved with both prevention and reduction of LTU. This is linked to the development of a service model to deal with the unemployed built around several elements<sup>4</sup>, among which a sophisticated methodology of case management. This is based on the early diagnosis of individual needs of jobseekers (*profiling*) with the aim to design **tailor-made action plans**, and a range of **personalised services** in tune with their **skills and competencies**.

### The new skills for new jobs initiative

The issue of **early identification of skill and competence needs** is growing in importance. In a rapidly changing economic and social environment, policy-makers and practitioners must be able to identify and respond promptly to new and changing skill and competence requirements. Such decisions depend on reliable information provided by research, which therefore takes on a central role in shaping future-oriented education and training, i.e. acquisition of skills and competences needed by the labour market. Furthermore, the process of European integration and EU enlargement makes the provision and availability of information about trends in the development of skills and competences even more important. Relevant findings could support both the development of a European knowledge-based society and the achievement of various objectives set in **European employment and lifelong learning strategies**.

The Commission's 2008 Strategic Report on economic and employment reforms and the Community Lisbon Programme stress that one of the key policy areas for reform is the improvement of the anticipation and matching of skills and labour market needs. Both documents state that "*The Commission will make proposals to address the skills gap by improving the forecasting and monitoring of future skills requirements*" by "*improving the capacity to anticipate EU-wide labour market trends and skills needs*".

The March 2008 European Council confirmed that investing in people and modernising labour markets remains one of the priority areas. It also "*invites the Commission to present a comprehensive assessment of the future skills requirements in Europe up to 2020, taking account of the impacts of technological change and ageing populations and to propose steps to anticipate future needs. Given the important role economic migration can play in respect of the labour market and skills shortages, cooperation in the field of legal migration should also be increased*". The December 2007 European

---

<sup>3</sup>

[http://ec.europa.eu/employment\\_social/employment\\_strategy/pdf/pes\\_missionstatement20061404\\_en.pdf](http://ec.europa.eu/employment_social/employment_strategy/pdf/pes_missionstatement20061404_en.pdf)

<sup>4</sup> "Joint Statement of European Employment Services concerning their role in preventing and reducing long-term unemployment", 22 June 2000



Council already stressed that "*Member States and the Commission should give priority to the implementation of the New Skills for New Jobs initiative*".

In November 2007, the Education Council adopted a resolution<sup>5</sup> on the "new skills for new jobs" initiative; this resolution aimed at a more coordinated approach based on existing structures in order to better respond to the objectives of the integrated guidelines of the Lisbon Strategy. Similarly, in December 2007, the EPSCO Council, in its Conclusions on the European Employment Strategy highlighted the "new skills for new jobs" initiative as one of the key areas for the future of the EES. This initiative emphasises practical steps to be taken in the area of education and training to provide citizens with better opportunities to succeed on the labour market. The emphasis is thus on three points.

First, equipping people with the skills necessary for new jobs. In this context, a specific reference is made to "disseminating information on the skills and competences needed for new jobs through EURES, the national employment services and the European and national networks on guidance".

Second, the importance of work on validating competences, transparency of qualifications and identification of training needs.

Third, the need for better anticipation of skill needs and gaps on the labour market. The Council invited the European Commission to strengthen the European network for the early identification of skill needs and the European forecasting system on employment trends.

Early identification of skill needs mainly concerns research and analysis at national, regional, local, sectoral and occupational levels as well as the **analysis of skill needs of specific target groups**, such as the low skilled, those at risk, disabled persons, minorities, and others. Approaches mainly include enterprise and labour force surveys at different levels, forecasting techniques<sup>6</sup>, case studies, analyses of job advertisements, expert inquiries, scenarios, and observatories on skill developments.

Against this background, the Public Employment Services play a key role, by delivering active labour market policies and ensuring greater transparency of employment, mobility<sup>7</sup> and training opportunities at national and European level (IG 20<sup>8</sup>) as well as a greater access to training for the unemployed and the inactive (IG 19)<sup>9</sup>. From this viewpoint, a specific contribution may come from these major labour market institutions whose mission is improving labour demand and supply matching, in terms of identifying, and ideally anticipating, jobseekers' skills (through such specific services as career guidance<sup>10</sup>) so as to improve labour force employability and meet employers' requirements<sup>11</sup>.

---

<sup>5</sup> <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2007:290:0001:0003:EN:PDF>

<sup>6</sup>An interesting example is represented by those initiatives aimed at finding a common European approach to identify skill needs and skill gaps (see, in particular, "*Future skill needs in Europe. Medium-term forecast. Synthesis report*" (Cedefop, February 2008 - [http://www.trainingvillage.gr/etv/Upload/Information\\_resources/Bookshop/485/4078\\_en.pdf](http://www.trainingvillage.gr/etv/Upload/Information_resources/Bookshop/485/4078_en.pdf)).

<sup>7</sup> "*Mobility, an instrument for more and better jobs: The European Job Mobility Action Plan (2007-2010)*", COM(2007) 773 final ([http://www.ec.europa.eu/employment\\_social/news/2007/dec/com\\_2007\\_0773\\_en.pdf](http://www.ec.europa.eu/employment_social/news/2007/dec/com_2007_0773_en.pdf)).

<sup>8</sup> Integrated guideline 20 mentions explicitly "*the need to improve matching of labour market needs through the modernisation and strengthening of labour market institutions, notably employment services, (...) better anticipation of skills needs, labour market shortages and bottlenecks (...)*"

<sup>9</sup> Integrated guideline 19 refers explicitly to "*Ensuring inclusive labour markets, enhance work attractiveness, and make work pay for job-seekers, (...) through active and preventive labour market measures including early identification of needs, job search assistance, guidance and training as part of personalised action plans, provision of necessary social services to support the inclusion of those furthest away from the labour market and contribute to the eradication of poverty, (...)*"

<sup>10</sup> *Career Guidance in Europe's Public Employment Services. Trends and Challenges* (October 2005-[http://ec.europa.eu/employment\\_social/employment\\_strategy/pesguidancereport\\_en.pdf](http://ec.europa.eu/employment_social/employment_strategy/pesguidancereport_en.pdf)).

<sup>11</sup> PES have potentially an important role to play as the gateway to lifelong learning, helping people to review the direction of their careers, helping them determine what learning would benefit them and steering them to appropriate institutions or learning packages

## 2. Purpose of the Contract

The scope of the study is to explore and analyse the national approaches, at the level of delivery chain of Public Employment Services, aimed at ensuring a better matching of labour demand and supply needs in a changing environment where new skills are required and the labour force is expected to be adaptable to such requirements.

The analysis should also contribute to the assessment of customer service performance upon the implementation of relationship management practices, as well as help identify possible good practices and likely further developments of the labour force early identification and upskilling approach.

The focus of the study is mainly put on how to exploit and implement the potential contribution of Public Employment Services within the wider context designed by the "New Skills for New Jobs" EU initiative.

More specifically, the subject of the contract is to provide a sound analysis and proper assessment of the current state of the art and development of the main actions taken by National PES.

The study will cover, amongst others, the relationship with and the cooperation with other actors delivering employment services, including Private Employment Services (PRES) and NGOs. It will cover all EU Member States and the EFTA/EEA countries Iceland, Norway and Liechtenstein.

It is foreseen that its results will be disseminated, also within the framework of a mutual learning process mainly through the dissemination of good practice in one or more seminars/meetings.

## 3. Tasks to be performed by the Contractor

The contractor is expected to produce an inception report, an intermediate report, a draft final report, and a final report (see point 8.1). All the reports have to be validated by the Commission. Additionally, the contractor must also be available to present the results of the study at an internal seminar in the Commission as well as an external event.

The final output of the contract will be a final report providing:

1. An inventory of the whole range of actions that can be taken by PES to empower the labour force in order to meet the changing labour demand, also in terms of "replacement demand".

More specifically, by "replacement demand" it is meant the demand which arises from the exit of workers from the working population, distinguished according to sex, age, status in the labour force (employed, unemployed, and other), and occupational group. Consequently, data from the Labour Force Survey (National and/or Eurostat) should be collected and eventually compared with those available at PES level. As a result, tables per single country need to be provided.

2. A mapping of existing practices at PES level in terms of addressing specific target groups and clients to enhance and adapt their competencies to the market (sectoral strategies, specific initiatives, projects, etc).

The "mapping" should be carried out in a clear relation to step 1, i.e. accordingly to the occupations and qualifications requested on the (local) labour market, as "perceived" by PES, both quantitatively (datasets on inflow of vacancies, etc) and qualitatively (surveys on enterprises, etc). As a result "boxes" per single country should be designed and delivered.

3. An analysis of the potential that can be further exploited on the PES side to contribute to the identification of new skills and new jobs.

The analysis of the "potential" should ideally be elaborated in terms of SWOT (Strengths, Weaknesses, Opportunities, and Threats) analysis, by providing a related clear "tables set"

For each of the three above issues, a number of questions internal to PES management and organisation will have to be addressed:

1. How to segment/differentiate the customers in order to better identify their skills/competencies and let them improve, adapt and/or acquire new ones? Is there any specific pattern/pathway in

this respect (e.g. an integrated approach) and/or specific professional profiles (e.g. employment advisers or counsellors) involved? In which way is involved labour demand and the employers' side (survey, enquires, etc) in order to identify their future needs so as to plan career/training/etc paths?

2. What are the factors for successfully building up tailor-made services (to jobseekers and job changers) so as to deliver personalized paths that may help people develop new/different skills?
3. Which services are delivered (e.g. Labour market information, skill mapping, career guidance, training, etc) and which are not, to what extent and through which channels? E.g.: *assessment/screening* (e.g. of individual attributes, competences, and preferences; of psychological state; of employability; of informal and non-formal learning); *career management planning* (e.g. helping individuals develop a Personal Action Plan; assistance in managing job changes); *individual intensive employment counselling* (e.g. through a case-management approach to employment assistance); *personality development* (e.g. promoting self-esteem in clients; coaching in social skills)
4. Which are (if any) the main target-groups addressed and what are the main challenges faced according to the different "customers"?
5. Which role PES do play as the gateway to guidance, education-to-work and job-to-job paths, lifelong learning, in helping people to review the direction of their careers and to determine what learning would benefit them and steering them to appropriate institutions or learning packages? Which specific contribution can be expected in terms of PES function and role to the EU wide initiative "New Skills for New Jobs"?

### Description of the tasks

#### **Task 1: Exhaustive and detailed inventory, by country (Mapping study)**

The contractor will conduct a brief but comprehensive description and analysis of the concept of "skill(s)" and "early identification" of labour force needs mainly in terms of employability. From this viewpoint, the contractor will identify (mapping) the practices and strategies implemented by the Public Employment Services. For example matching and vocational training services in a combined and/or complementary way or profiling techniques to identify employment barriers personalised for each users so as to provide tailor-made services to jobseekers, eligible to different services according to their distance from the labour market. This should be done in a cross-countries view, by analysing and assessing data and case studies in different landscapes and scenario throughout the EU Member States, so to make appropriate comparisons, with a specific focus on: what has been developed so far; what has worked/not worked; how models have been implemented and eventually adapted to the changing environment, also including guideline principles and practical examples. The contractor should base, but not limit, this work on all the existing analyses on this subject.

#### **Task 2: Data collection and assessment**

This task includes an analysis and synthesis of data of the services and activities delivered and possible new initiatives implemented in order to face the new trend of labour demand and changing labour market needs. It will in particular investigate and identify which target-groups are mainly involved, how they are addressed and through which specific paths/approaches. The contractor will use data (e.g. on job vacancies) to address labour market mismatches and new trends on the labour demand side, by pinpointing emerging shortages and gaps, and thus directing and shaping services to job seekers and employers while anticipating their needs and recruitment difficulties. The contractor will also include a description of the classification used by the PES (ISCO, ROME, etc.). In this respect, the data collection should be meant as covering two dimensions:

- a. the "short-term perspective": monitoring the issue of labour market mismatches on the basis of statistics and other relevant sources of information on labour market mismatches
- b. the "long-term perspective" in terms of "new trends on the labour demand side" based on possible forecasting modelling exercises, e.g. prospective methods.

#### **Task 3 Analysis and Forward looking**

The analysis will specifically focus on the potential and actual benefit of the contribution that public employment services, through the implementation of active labour market policies, in particular, may

have in terms of early identification and anticipation of skill needs. Namely the actions expected to facilitate/improve the matching between workers and employers, i.e. retraining programmes which are expected to give workers the skills required by firms, whilst employment services can provide better information on vacancies or help to improve the search effectiveness of the unemployed and/or restore the employability of the participants.

The study will also explore possible innovative ways to improve the service delivery and how to further develop what achieved so far, by describing (and, where possible, assessing) the different methods used by PES to deliver the above mentioned actions/programmes.

#### **Task 4: Good practices and transfer of findings**

The study will also focus on the identification and selection of good practices in implementing new approaches and strategies to shape the labour force and help jobseekers and job changers to meet the changing requirements of the market. The contractor will conduct a survey on experiences amongst PES, in this respect, with special focus on the transfer of findings into policy and the implementation of the initiatives. The contractor will assess the implementation of activities that fall within the area of "personalised employment services" through client segmentation, giving special attention to those categories that have particularly acute needs for individualised and tailor-made support on the road to employment: these include the long-term unemployed, women returnees, persons with disabilities<sup>12</sup>, the unqualified and low-skilled, company-closure clients, elder people, young people, migrants, people living in very remote areas) and customers with a variety of social problems since far from the labour market and with no (or minor) possibility to exit the unemployment status. The specific targets mentioned above are indeed belonging to those groups in society that are typically most in risk being further excluded and therefore need special support in terms of tailor-made services aimed at identifying labour force skill and their possible needs in relation to the new labour market trends and changing labour demand.

#### **Task 5: Final report, publication and dissemination of the results**

The contractor will draft a final report in which a comparative analysis of the various initiatives and their results will be presented. This report will summarise the work carried out under tasks 1 to 4. It will include, in particular, the type of initiatives, one sheet per country, and the presentation of case studies. It will also include a comparative analysis. This analysis will have to highlight the differences between and the common denominators of all the initiatives. It will also compare the effectiveness and relevance of recognised national and regional initiatives and initiatives taken individually by companies. The contractor will draw conclusions on the relevance and value added of these initiatives, by making a clear link to the guidelines and principles included in the Council Resolution of 15 November 2007 on the New skills for New jobs (2007/C 290/01) with a specific reference to those related to the "employment services" tasks and role.

#### **Other tasks to be carried out**

In executing this contract, the contractor will be expected to work closely with the Commission.

The contractor will appoint a person to coordinate the project, who will be the Commission's contact point.

The implementation of the contract will be monitored by a steering committee comprising persons representing the contractor, the relevant Commission services and external experts.

The contractor will attend a maximum of 6 meetings in Brussels during the term of the contract. Budget resources should therefore be earmarked for these participations in the bid.

A maximum of six trips from the contractor's place of work to the Commission's offices in Brussels should be foreseen: kick-off meeting, presentation of inception report, presentation of intermediate report, presentation of draft final report, and presentation of final report. Additionally, the contractor

---

<sup>12</sup> Commission Communication "*Third Edition of European Action Plan for people with disabilities (2008-2009)*", COM(2003) 650 final (November 2007).

must also be available to present the results of the study at meetings or working groups organised by the Commission.

The study should have the following features:

- the text of all documents will be drafted in English;
- it will be provided to the European Commission in electronic format as Microsoft Word document, with charts in Microsoft Excel and presentations in Microsoft PowerPoint;

The Commission will need to approve the inception report, the intermediate report and the draft final report, respectively, before work proceeds.

#### **4. Expertise required**<sup>13</sup>

See Annex IV.

##### ***Specific requirements other than those mentioned in Annex IV***

Tenderers interested in carrying out the study are invited to put forward a team of experts who can demonstrate a solid experience on the field of the study and documented good knowledge.

The tenderer should provide a methodology. This must include all information demonstrating the technical capacity needed to successfully carry out the work requested. The technical proposal should address all matters laid down in the description of the tasks and should include models, examples and solutions to problems raised in the specifications.

#### **5. Schedule of reports – Terms for approval, structure and content**

See Article I.4.

##### **5.1 Additional requirements (specific deadlines for the performance of tasks):**

The full duration of the contract will be 18 months, from the date of contract signature.

The project is expected to produce one inception report, one intermediate report, and a final report, on the basis of the following indicative timetable:

**Kick-off meeting** (within one month after the signature of the contract)

**Inception meeting** – to prepare for the meeting the contractor is expected to provide an inception report, specifying the plan of work, the distribution of tasks in the team and the methodological tools of the study (3 months after the signature of contract).

**Intermediate report** – to cover the progress of work done and first results should be submitted within 8 months after the signature of the contract. The intermediate report should explain progress made so far, covering tasks 1 to 3 described under point 6 above (8 months after the signature of the contract).

**Draft final report** – to present the draft final report, to be written in English for a maximum 100 pages (excluding annexes). (14 months after the signature of the contract).

The draft final report should cover tasks 1 to 5 under point 6 above and contain

- 1) descriptive fiches on good practices which can be published on the website for dissemination purposes and
- 2) the conclusions and recommendations of the study, which should be presented in a very clear and concise way.

**Final report** – this will be submitted 16 months after signature of the contract. The final report will include a PowerPoint Presentation explaining the context and the results of the study, as well as

---

<sup>13</sup> See Article II.1 as regards the replacement of experts.

speaking points (30 minutes presentation) in English, French and German. The contractor will be asked to present the Final report to Commission staff.

**Dissemination meeting** – by the end of the contract (18 months after the signature of the contract and after approval by the Commission of the final report). The contractor will be asked to make a presentation of the study to the Commission staff and/or to external persons.

All reports described above will be submitted in English, in 3 hard copies as well as in electronic format. As a matter of principle, with a view to favouring valorisation by the European Commission of all results obtained and outputs delivered under PROGRESS programme, the Contractor will be required to provide - either upon specific request or in any event with the final activity report - for each of the tasks required under the present Call the following:

- 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.
- And an executive summary in 5/6 pages in English, French and German.

## 5.2 How activities shall 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:

- Gender equality issues are taken into account when relevant for the drafting of the technical offer by paying attention to the situation and needs of women and men;
- Implementation of the requested tasks includes a gender perspective by considering systematically women and men dimension;
- Performance monitoring includes the collection and gathering of data disaggregated by sex when needed.
- its proposed team and/or staff respects the gender balance at all levels.

Equally, needs of disabled people shall be duly acknowledged and met while implementing the action. 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.

Finally, the European Commission 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 requirements.

## 5.3 Publicity and information requirements:

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. In the context of PROGRESS, the following formulation shall be used:

*This (publication, conference, training session) is supported for under the European Community Programme for Employment and Social Solidarity (2007-2013). This programme is managed by the Directorate-General for Employment, social affairs and equal opportunities of the European Commission. It 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-EEA and EU candidate and pre-candidate countries.*

*PROGRESS mission is to strengthen the EU contribution in support of Member States' commitments and efforts to create more and better jobs and to build a more cohesive society. To that effect, PROGRESS will be instrumental in:*

- *providing analysis and policy advice on PROGRESS policy areas;*
- *monitoring and reporting on the implementation of EU legislation and policies in PROGRESS policy areas;*
- *promoting policy transfer, learning and support among Member States on EU objectives and priorities; and*
- *relaying the views of the stakeholders and society at large*

*For more information see:*

*[http://ec.europa.eu/employment\\_social/progress/index\\_en.html](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 if any another logo developed for the employment and social solidarity fields, and mention the European Commission as the Contracting Authority in every publication or related material developed under the present study contract.

## **6. Additional information to the Tender specifications and monitoring**

See attached document(s): ..... pages.

---

## Contractor's Tender

ANNEX II

Registre CAD Ref. No. .... of .....

---

See attached document: ..... pages.

Draft  
Draft



## ANNEX III Breakdown of prices

### 1. Breakdown of prices

Description	Unit price in €	Max. No of units	Unit type	Sub-total per item	Total amounts in €
<b>FEES AND DIRECT COSTS</b> (fixed prices)					
Experts' fees (to be specified for each expert)					0,00
Details	0,00	0	w.d.	0,00	
Other direct costs (to be specified)					0,00
Details	0,00	0	unit	0,00	
<b>Sub-total "Fees and Direct Costs" (Art. I.3.1)</b>					<b>0,00</b>
<b>REIMBURSABLE EXPENSES</b> (max. prices)					
Travel expenses					0,00
Journeys for experts as mentioned in Annex I					
Details	0,00	0	trip	0,00	
Provision for supplementary journeys effected upon request of the Commission					
Details	0,00	0	trip	0,00	
Accommodation expense					0,00
Hotel for experts as mentioned in Annex I					
Details	0,00	0	pers.	0,00	
Provision for supplementary accommodation upon request of the Commission					
Details	0,00	0	pers.	0,00	
Subsistence expense					0,00
Subsistence expenses for experts as mentioned in Annex I					
Details	0,00	0	w.d.	0,00	
Provision for supplementary subsistence upon request of the Commission					
Details	0,00	0	w.d.	0,00	
Shipment and/or other reimbursements (to be specified)					0,00
Details	0,00	0	unit	0,00	
Contingencies (cannot be used without the prior and express approval by the Commission, by the way of a written note allowing for reallocation(s) of part or total of this provision to one or several items above)					
Calculation base	0,00				
Contingencies: approx. % of calculation base		0	%	0,00	
<b>Sub-total "Reimbursable Expenses" (Art. I.3.3)</b>					<b>0,00</b>
<b>Overall Total</b>					<b>0,00</b>

w.d. = 1 working day for 1 expert

#### Additional information to the Breakdown of prices

See attached document: ..... pages.

## **2. Calculation of amounts due under the present Contract**

### **2.1. Fees**

Initial calculation based on unit price(s) per w.d. of expert(s) depending on the level of qualification of the expert(s) executing the mission. The unit price(s) is (are) expected to cover the expert(s) fees, the Contractor's administrative expenses, as well as the costs of producing the contractual number of copies of the required report(s)<sup>14</sup> in the required format(s), but does not include the reimbursable expenses defined below.

*N.B. Duration of the services:* This includes, besides the time necessary for the carrying out of the services themselves, the necessary time for preparatory work, trips and travelling back and forth between the offices of the Contractor and/or the expert(s) and the places where the services are being carried out and for meetings with the services of the Commission, as well as time for the preparation of reports and output documents related to the work.

### **2.2. Reimbursements**

If the reimbursement of expenses is foreseen in the Special Conditions, the Commission will reimburse only:

- the subsistence expenses of the Contractor and his staff,
  - travel expenses (other than local transport costs),
  - expenses for the shipment of equipment or unaccompanied luggage,
- directly connected with performance of the tasks specified in Article I.1. of this Contract.

#### **2.2.1 DSAs (Daily Subsistence Allowances)**

The daily subsistence allowance (DSA) is paid as a flat-rate amount and is considered to cover breakfast and two main meals, local travel, the cost of telecommunications, including fax and Internet, and all other sundries. They will be paid for each calendar day spent on mission away from the usual place of work, provided that the corresponding assignment is of a short-term nature. The DSA will vary according to the country in which the missions are to be carried out.

Daily subsistence allowances (DSA) are to be calculated as follows according to the length of the mission:

- 6 hours or less: reimbursement of actual expenses (on production of supporting documents);
- more than 6 hours but not more than 12 hours: 0.5 DSA;
- more than 12 hours, but not more than 24 hours: 1 DSA;
- more than 24 hours but not more than 36 hours: 1.5 DSA;
- more than 36 hours but not more than 48 hours: 2 DSA;
- more than 48 hours but not more than 60 : 2.5 DSA, and so on.

The agreed rates (in EUR per calendar day) to be used for the purposes of the present Contract are set as follows:

---

<sup>14</sup> All details on Monitoring and Reporting are to be indicated and included in the Tender Specifications.

Destinations		DSA in EUR	Maximum hotel price in EUR
AT	Austria	95,00	130,00
BE	Belgium	92,00	140,00
BG	Bulgaria	58,00	169,00
CY	Cyprus	93,00	145,00
CZ	Czech Republic	75,00	155,00
DE	Germany	93,00	115,00
DK	Denmark	120,00	150,00
EE	Estonia	71,00	110,00
EL	Greece	82,00	140,00
ES	Spain	87,00	125,00
FI	Finland	104,00	140,00
FR	France	95,00	150,00
HR	Croatia	60,00	120,00
HU	Hungary	72,00	150,00
IE	Ireland	104,00	150,00

Destinations		DSA in EUR	Maximum hotel price in EUR
IT	Italy	95,00	135,00
LT	Lithuania	68,00	115,00
LU	Luxembourg	92,00	145,00
LV	Latvia	66,00	145,00
MK	F.Y.R. of Macedonia	50,00	160,00
MT	Malta	90,00	115,00
NL	The Netherlands	93,00	170,00
PL	Poland	72,00	145,00
PT	Portugal	84,00	120,00
RO	Romania	52,00	170,00
SE	Sweden	97,00	160,00
SI	Slovenia	70,00	110,00
SK	Slovakia	80,00	125,00
TR	Turkey	55,00	165,00
UK	United Kingdom	101,00	175,00

### 2.2.2 Travel expenses

Travel expenses shall be reimbursed following the provisions of Article II.7.3.

### 3. Additional provision

It is understood that the Parts “Fees and Direct Costs” and “Reimbursable Expenses” are set as provisions only. They constitute a maximum for the overall cumulative value of all services rendered by the Contractor under the present Contract – they will be due only if services are actually rendered to the Commission according to this Contract and its Annexes, both in quantity and in quality.

## ANNEX IV CVs and classification of experts

### 1. Classification of experts according to level of expertise

<i>Level of qualification</i>	<i>Category of personnel</i>
I	Highly qualified expert having assumed important responsibilities in his/her profession, recruited for his/her management/supervisory, thought and creativity skills as regards professional practise. He/she must have at least 15 years professional experience of which at least 7 must be connected with the professional sector concerned and the type of tasks to be performed.
II	Highly qualified expert having assumed responsibilities in his/her profession, recruited for his/her management/supervisory, thought and creativity skills as regards professional practise. He/she must have at least 10 years professional experience of which at least 4 must be connected with the professional sector concerned and the type of tasks to be performed.
III	Certified expert having received a high-level training in his/her profession, recruited for his/her thought and creativity skills as regards professional practise. He/she must have at least 5 years professional experience of which at least 2 must be connected with the professional sector concerned and the type of tasks to be performed.
IV	Junior expert, newcomer to the profession but holding a university degree or equivalent training related to the professional sector concerned and the type of tasks to be performed.

### 2. List of experts assigned

<i>Full names of experts assigned</i>	<i>Level of Qualification (I to iv, see above)</i>

### 3. CVs of experts assigned

See Annex II.

---

## Fiscal provisions regarding invoicing by the Contractor

---

Choose 1 out of 4 options:

- **(option 1: the Contractor is subject to VAT and his place of fiscal imposition is in Belgium)**

### Local supplies and services

Supplier with fiscal imposition place in Belgium – delivery address in Belgium

#### 1. VAT exemption – Exemption level

In Belgium, the terms of the present Contract have the same value as the VAT exemption request No 450 (VAT exemption – Article 42, par. 3.3, VAT Code).  
The European Commission benefits of a direct VAT exemption for all invoices EUR 123.95 and more.

#### 2. Invoicing the Commission

An invoice will be made for each payment related to the present Contract. The applied VAT rate and amount shall be specified.

In view of VAT exemption, invoices addressed to the European Commission should bear the mention: “Exonération de la TVA, article 42, § 3.3, du code de la TVA” or “Vrijstelling van BTW, artikel 42, § 3.3, BTW-Wetboek”.

The above indication is given only as piece of information. The Contractor must refer to the Belgian national laws.

- **(option 2: the Contractor is subject to VAT and his place of fiscal imposition is a Member State other than Belgium)**

### Intra-community supplies and services

Supplier with fiscal imposition place in a Member State other than Belgium – delivery address in Belgium

#### 1. VAT exemption level

The European Commission benefits of a direct exemption of VAT for all invoices of EUR 123.95 and more.

#### 2. Use of form 15.10

To allow the Contractor to justify to the fiscal authorities an invoicing to the European Commission using a 0% VAT rate (direct exemption) or to enable the benefit of the exemption by reimbursement, it is necessary to use the form 15.10.

These forms have recently been up-dated, and the new versions are the only ones to remain in official use. They entered into force on 01.04.1997, with a new ref. XXI/03278 – 01.04.1997.

See attached document: 2 pages and 1 page of explanatory notes.

### **3. Signature of the form 15.10 – Delegation of signature**

The forms must normally be signed by the fiscal authorities of Belgium. However, a delegation of signature has been awarded by the Belgium authorities to the European Commission – ref. ET 76430 of 22.12.1992 (this ref. No. should be inserted in box 7 of new form 15.10). The Commission being represented for the present Contract by Wallis GOELEN, Head of Unit - EMPL/D/3 of Employment, Social Affairs and Equal Opportunities DG, form 15.10 will therefore be signed by the latter.

### **4. Invoicing the Commission**

An invoice will be made for each payment related to the present Contract. The applied VAT rate and amount shall be specified. Concerning the direct VAT exemption or VAT exemption by the way of reimbursement, the invoice shall bear all the necessary mentions.

The above indication is given only as piece of information. The Contractor must refer to the national laws in force in his Member State of fiscal imposition.

Draft  
Draft

- ▶ **(option 3: the Contractor is not subject to VAT)**

Not applicable to the present Contract.

- ▶ **(option 4: the country of fiscal imposition of the Contractor is unknown)**

Provisions to be applied depending on the country of fiscal imposition of the Contractor..

Draft  
Draft