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## Specifications - Open Invitation to tender No VT/2012/027

**Proposal for a service contract for the production of a non-binding modular guide to good practice with a view to improving the application of the Community Directives on protecting the health and safety of workers by reducing work related vehicle risk ('WRVR').**

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### 1. TITLE OF THE CONTRACT

Proposal for a service contract for the production of a non-binding modular guide to good practice with a view to improving the application of the Community Directives on protecting the health and safety of workers by reducing work related vehicle risk ('WRVR').

### 2. BACKGROUND

#### 2.1. PROGRESS Introduction

PROGRESS<sup>1</sup> is the EU employment and social solidarity programme, set up to provide financial support for the attainment of the European Union's objectives in employment, social affairs and equal opportunities as set out in the Social Agenda<sup>2</sup>. 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 PROGRESS mission is to strengthen the EU's contribution in support of Member States' commitments and efforts to create more and better jobs and to build a more cohesive society. To this 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 supports:

- The implementation of the European Employment Strategy (section 1);
- The implementation of the open method of coordination in the field of social protection and inclusion (section 2);
- The improvement of the working environment and conditions including health and safety at work and reconciling work and family life (section 3);
- The effective implementation of the principle of non-discrimination and promotion of its mainstreaming in all EU policies (section 4);
- 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 2012 annual work plan which can be consulted at:

<http://ec.europa.eu/social/main.jsp?catId=658&langId=en>

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1 Decision No 1672/2006/EC of the European Parliament and of the Council of 24 October 2006 establishing a Community Programme for Employment and Social Solidarity — Progress, JO L 315 of 15.11.2006

2 Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions - Renewed social agenda: Opportunities, access and solidarity in 21st century Europe COM/2008/0412 final of 02.07.2008.

## 2.2. Background information specific to this contract – Community Directives applicable in the health and safety of workers reducing work related vehicle risk.

The prime objective of the current Community strategy 2007-2012<sup>3</sup>, supported by the Council Resolution of 25 June 2007<sup>4</sup>, remains the continued improvement of working conditions and health and safety for workers at work, notably through an ongoing and sustainable reduction in work accidents, injury and occupational diseases. In this context, the Commission notes that, in order to achieve this goal, the correct and effective implementation of Community legislation must be reinforced while supporting SMEs, particularly in “high-risk” sectors, such as construction, agriculture, fishing and transport. The Communication therefore provides for the Commission, through the new PROGRESS programme and in cooperation with the Advisory Committee<sup>5</sup>, to draw up non-binding practical guides on the correct application of Directives.

Several Directives<sup>6 7 8 9 10 11</sup> on health protection and safety for workers at work apply to this activity, starting with the Framework Directive 89/391/EEC on the introduction of measures to encourage improvements in the safety and health of workers at work.

All the individual Directives under the Framework Directive also apply to some limited extent, with the exception of Directive 92/29/EEC on medical treatment on board vessels.

Accordingly, the Commission feels it would be very appropriate to draw up a non-binding modular guide to good practice which, going beyond any other possible initiative, would have the aim of improving the understanding and practical implementation of the various Directives on health and safety protection for workers in the sectors with work related vehicle risks.

**Work related vehicle safety (WRVS)** refers to the management of the hazards and risks associated with work activities involving vehicles and mobile equipment. This includes the risks to employers, self-employed people, employees and members of the public.

**Vehicle** - means any device used to transport goods, people or equipment from place to place and which is mechanically powered.

**Mobile equipment** - means plant which is designed to carry out specific functions, but which can be moved from place to place under its own power. Examples include, mobile elevated working platforms, mobile cranes and straddle carriers.

The following diagram describes the relationship between the different categories to which workers may be exposed to risk.

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3 Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions – Improving quality and productivity at work: Community strategy 2007-2012 on health and safety at work [COM(2007) 62 final of 21 February 2007].

4 Council Resolution of 25 June 2007 on a new Community strategy on health and safety at work (2007-2012), OJ C 145, 30.06.2007, p. 1.

5 Council Decision of 22 July 2003 on the setting up of an Advisory Committee on Safety and Health at Work, OJ C 128, 13.09.2003, p. 1.

6 Council Directive 89/391/EEC of 12 June 1989 on the introduction of measures improvements in the safety and health of workers at work, OJL 183, 29.06.1989; p.1.

7 Council Directive 89/654/EEC of 30 November 1989 concerning the minimum safety and health requirements for the workplace, OJL 393, 30.12.1989, p.1.

8 Council Directive 92/91/EEC of 3 November 1992 concerning the minimum requirements for improving the safety and health protection of workers in the mineral-extracting industries through drilling, OJL 348, 28.11.1992, p.9.

9 Council Directive 92/104/EEC of 3 December 1992 on the minimum requirements for improving the safety and health protection of workers in surface and underground mineral-extracting industries, OJL 404, 31.12.1992, p.10.

10 Directive 1999/92/EC of the European Parliament and the Council of 16 December 1999 on minimum requirements for improving the safety and health protection of workers potentially at risk from explosive atmospheres, OJL 23, 28.1.2000, p.57.

11 Council Directive 93/103/EC of 23 November 1993 concerning the minimum safety and health requirements for work on board fishing vessels, OJL 307, 13.12.1993, p.1.



**WRVS** includes:

**Workplace transport safety** – is the management of the hazards and risks associated with any vehicle or piece of mobile equipment that is used by an employer, employee, self-employed person or a visitor in a fixed or temporary workplace but excludes work related road safety.

**Work related road safety** – is the management of the hazards and risks to persons engaged in or affected by work related driving or work activities on or near a road.

**Driving for work** – this is the activity of driving on the road for work purposes. This includes the risks posed to workers themselves, but also to those not at work who may be affected by the work activity, such as pedestrians. Driving for work excludes commuting to work,

The term "Specific Physical Activity" used in the codification of accidents is designed to describe the victim's activity immediately before the accident. (I.e. it records the victim's deliberate and purposeful action). Within this classification the Codes 30-39 "Driving or being on board handling equipment" covers driving or being aboard any sort of vehicle, whether motorised or not. These codes also encompass driving mobile handling equipment (e.g. forklift trucks) whether motorised or not.

Therefore it is clear that "Driving" is considered to be a part of the working process.

In the first category there are the accepted "professional drivers" for example those who drive lorries, buses, taxis, vans, cars and two wheelers on a full time basis.

There is a secondary group of workers for whom driving is not a core task these include the regular or occasional drivers who are required to drive as part of their daily work such as sales representatives, craftsmen, maintenance technicians, building workers, or the worker moving between locations etc etc....

Finally there is the group of workers who are involved in all activities related to the loading and unloading as part of their daily work, e.g. fork lift truck drivers, who may not access the public highway but are driving for work on the employer's premises.

The issue of driving is also compounded by the changing nature of employment as for instance workers travel ever increasing distances on a daily basis or there is the need to deliver goods in ever shorter deadlines.

WRVS must therefore be considered as an occupational risk and integrated into prevention policies at the employer's level.

Analysis of Causes and circumstances of accidents at work in the EU data gives the following statistics in the category:

Code 30. Driving or being on board handling equipment or a means of transport.

29% of fatal accidents at work are due to loss of control of means of transport or handling equipment. This is compared to 4% of non fatal accidents in the same category.

Types of vehicles involved in an accident are.

42% involve light vehicles  
28% involve Heavy Goods Vehicles (HGV)  
6% involve 2 or 3 wheelers

Young workers are particularly affected by fatal accidents involving loss of control of a vehicle with 13% of fatalities being in the under 25 age group, compared with 8% in the 18-24 years old for all fatal accidents at work.

Currently there is no comprehensive guidance at the EU level on how Employers and Workers should work together to reduce these statistics.

The various Directives constitute the most appropriate means of achieving the objectives of the strategy for 2007-2012 without going further than what is needed in order to do so. They lay down minimum requirements obliging employers to identify and assess risks, identify the measures needed in order to prevent them and, where they cannot be prevented, to reduce/tackle them, preferably at source, by adapting the job to the man, taking account of technical progress, giving collective protective measures priority over individual protective measures, and providing workers with appropriate information and training. Some of these Directives lay down exposure limit values and exposure action values to protect workers exposed to specific risks, such as certain physical, chemical or biological agents.

Among other obligations, the Directives on health and safety require employers to avoid risks, and assess the risks which cannot be avoided, and subsequently take measures to improve the level of protection of the health and safety of workers. Work accident, injury and occupational disease rates are particularly high in relation to WRVR. In this connection it is emphasised that the Community strategy for 2007-2012 quantifies the objective of an ongoing, sustainable and uniform reduction in work accidents, stipulating a 25% cut in the overall rate per 100 000 workers at EU-27 level.

### **3. SUBJECT OF THE CONTRACT**

This invitation to tender is intended to attract bids with a view to collecting the information in order to prepare and produce a draft non-binding modular guide to good practice as referred to in Section 1 of these specifications. This guide should set out and provide practical guidance for better application of the Directives on the health and safety of workers who use or come into contact with a vehicle as part of their professional duties.

The guide must cover the methods used for identifying and evaluating risks and offer assistance with the choice and correct use of work equipment and the optimisation and implementation of preventive measures (technical and/or organisational) on the basis of a prior risk analysis. It must also include information on the types of training and information to be provided to the workers concerned and propose effective solutions to all safety and health problems relating to workers who use or come into contact with a vehicle as part of their professional duties.

The modular guide must be based on didactic principles so as to facilitate its use by non-specialists; it should use simple language, video clips, pictograms, pictures, diagrams, etc. to facilitate their understanding. All issues related to copyright of such images are the responsibility of the tenderer. (See details in model contract)

An indication of the type of information and level of detail required can be found in the existing examples of non-binding guides on different subjects:

A number of these examples of existing guides may be found on the webpage hereunder.

<http://ec.europa.eu/social/main.jsp?catId=82&langId=en&furtherPubs=yes>

The draft guide must, inter alia should pay special attention to:

- The specific features of vehicle use belonging to small and very small companies (family or artisanal firms); this can lead to constraints in the investment in new equipment, or formal training courses or the time devoted to health and safety issues;
- Risks resulting from working with different types of vehicles;
- Risks resulting from the simultaneous presence of workers from different cultures and migrant workers, and the possible communication problems arising;
- Risks related to consumption of alcohol, medicines, drugs as well as fatigue;
- The draft modular guide must also facilitate the adoption of measures to eliminate or reduce WRVR, and must include examples to assist this task. In particular, it should be easy to apply.

The draft guide must have a modular structure so that it can be generally applied to all types and sizes of vehicle. It must facilitate the risk assessment referred to in the various directives.

### **Form of the non-binding modular guide to good practice.**

The non-binding modular guide to good practice will be based on an electronic format and be interactive. (It will not be produced in paper versions).

Furthermore the use of a purely electronic version will allow:

- wider dissemination as more people will have access to technology in future years;
- updating, information can easily be added, removed;
- focus on end user, the guide will have electronically customised access to content on a particular industry/work group type;
- use of animation/video message embedded in the guidance text;
- Compatibility with/potential use of the European Agency for Safety and Health at Work (EU-OSHA) Online Interactive Risk Assessment tool (OiRA). Hosting will be on the DG EMPL and/or EU-OSHA websites.

### **The non-binding good practice page layout, design and structure.**

Each electronic page of the guide must conform to the layout design and technical requirements shown in annex III

The draft guide must be structured as follows:

Foreword, Introduction, How to read and navigate through the guide, the structure of the different sub sections and user search capabilities. It must be in a modular form using simple language, pictograms, pictures, diagrams, video clips, etc. to facilitate understanding. Keyword searches of the document should also be included.

The tender should define the exact structure of the draft guide. The offer should clearly indicate how the above mentioned factors, risks and activities will be incorporated into the general structure of the guide. This structure will be used to evaluate the understanding and methodological approach of the tenderer at the evaluation stage.

The draft guide must be provided in English in interactive electronic form including the possibility to disseminate by DVD. The product should be intuitive to use and interactive enough so that users – regardless of their technical skills – can easily access the required information, this includes the web based search engine;

The text of the guide will be translated into all official European Union languages and as such the contractor must also consider the feasibility of providing subtitles and/or other mechanisms that allow the message to be translated for the video media part of the package.

Any risk assessment checklists/tools that are developed should follow the OiRA template. The contractor should work closely with the OiRA developers to ensure compatibility. The template which replicates the structure of the OiRA tools is found at: [www.oiraproject.eu/support/technical-guides/offline-xls-template-to-create-a-tool](http://www.oiraproject.eu/support/technical-guides/offline-xls-template-to-create-a-tool) Details of OiRA found at <http://www.oiraproject.eu/>

□ The draft guide must contain a bibliography of existing national and international guides and European standards (CEN – CENELEC) on the subject, available at the EU-27, Member States EFTA-EEA and EU candidate and pre-candidate countries level and from international bodies and institutions (ILO – WHO – IMO – ISO etc.) as well as a glossary of technical terms used in the guide, and definitions to assist the understanding.

### **Key subjects to be covered in the non-binding good practice guide to Managing Work Related Vehicle Risk .**

The key subjects to be explained in the non-binding good practice guide are detailed in Annex IV.

Please note that list is not exhaustive, it has been created to assist the tenderer in understanding the scope of the project which is very broad. Items or the structure of the task can be added/ deleted/modified during the contract period following guidance from the Commission and the Monitoring Committee created to supervise the technical content of the project. The tenderer in their offer should indicate separately any additional items which they consider useful to be added to the list below.

For each of the key subjects the non-binding good practice guide should include the following principles:

- **it must indicate the general prevention principle which is being applied;**
- **it must be taken into account that WRVR is one part of all the risks related to work and how each recommendation/good practice has to be evaluated against its impact on other risks (I.e. is risk transferred to another activity);**
- **the population targeted by the issue and the practices has to appear on the factsheet: e.g. Employers, worker or both;**
- **Where relevant, it must be clearly stated how the implementation and/or the respect of the recommendation is checked and promote good practice to check compliance.**

The contents of the non-binding good practice guide must include a search engine which is capable of selecting pre-defined topics which are relevant to the particular reader for example: By worker/management profile or subject matter. This non-exhaustive list may include:

- Van driver
- Professional driver (e.g. HGV, Passenger vehicle)
- Fleet manager
- CEO or senior manager
- Safety responsible / line manager
- Road worker
- Warehouse operatives
  
- Management of vehicle related risk
- Supply chain
- Driving for work
- Fleet safety (benchmarking)
- Occupational road risk
- Occupational road safety
- Road safety and worker road safety

- Traffic management system

#### 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.

#### 5. TASKS TO BE CARRIED OUT BY THE CONTRACTOR

##### 5.1. Description of the tasks

The contractor's main tasks will be geared to preparing a draft modular non-binding good practice guide (modular guide) which includes the elements mentioned in section 3 of these specifications and will allow all those involved in the practical implementation of the Directives on health and safety at work, especially small and medium-sized enterprises (SMEs) and very small businesses (family or artisanal firms), to eliminate or minimise the risks to which workers are exposed during activities involving coming into contact with a vehicle.

In this respect, the contractor should take account of the fact that most of the users to whom the guide is aimed will be employers and workers with very diverse expertise and who are working with vehicles of different types and sizes. The draft modular guide must be comprehensible to the different players in different fields with different resources, where workers with different cultures and nationalities co-exist.

Consequently, this non-binding modular guide to good practice must cover not only general and practical guidelines but also the elements necessary to achieve the objectives set out in section 3, "Subject of the contract", of these specifications.

To this end the contractor, starting from the studies and guides on the subject already in existence, must:

- (1) collect the information required for preparing a draft non-binding modular guide and make it available to the Commission along with the draft modular guide. This information must be included in the final report to be submitted to the Commission at the end of the work;
- (2) devise a working method, which will be discussed and adopted by a "Monitoring Committee" (MC) appointed by the Advisory Committee on Safety and Health at Work<sup>11</sup>, at the **first (1st) meeting** following the signature of the contract;
- (3) prepare a preliminary version of the draft modular guide, which will be discussed, and adapted following suggestions and contributions made within the "Monitoring Committee" (MC) and proposals made by the Commission (Unit EMPL B/3);
- (4) take part in up to **twelve (12) meetings, six (6) with the Commission (Unit EMPL B/3) and six (6) with the "Monitoring Committee" (MC)**. The latter will take place the day after each meeting with the Commission, which each time will discuss the draft modular guide adapted following the previous meetings. These meetings will be held in the Commission premises in Luxembourg;
- (5) adapt the draft modular guide no later than **three (3) weeks** after each meeting with the "Monitoring Committee" (MC), taking account of the suggestions and proposals made by the Commission (Unit EMPL B/3) and by the members of the "Monitoring Committee" (MC);

(6) verify and validate the capacity of the draft modular guide as indicated in section 3 of these specifications. **In this connection the contractor will test the draft modular guide** in collaboration with the competent national authorities in **three (3) Member States** of the European Union and with the support of the National competent authorities, on **three (3) types of undertaking activity** to be selected by the “Monitoring Committee” (MC) **acting on a proposal from the contractor twelve (12) months after the signature of the contract.**

Types of undertaking could include:

- Heavy Goods Vehicle fleet operators
- Passenger transport
- Delivery vehicle users
- Mixed fleet user e.g. utility company (water, gas, electricity etc)
- On site mixed fleet user (e.g. airport, container port )
- Government fleet
- Company car users and users of personal transport for company purposes (Grey fleet)
- Etc.

(7) present a final report at the end of the contract, including the final draft of the modular guide, the information gathered during testing on **the three (3) types of vehicle user and/or activity** selected, as well as the bibliographical references. The contractor will propose a draft modular guide containing elements fulfilling the following purposes:

- to refer to the general principles underlying Community legislation on safety and health at work. The modular guide will also refer to the principles on which the legislation is based, including the general obligations on employers, provisions on worker information, the consultation and participation of workers, the training of workers, workers obligations and health surveillance;
- to generally permit the identification and assessment of risks and thus be able to make provision for specific measures to ensure the safety and protect the health of workers exposed to risks as a result of their work coming into contact with vehicles.

## 5.2. Methodology

In their bids, tenderers must indicate the methods they intend to use, including the modular aspect of the guide and the testing of the draft modular guide in collaboration with the competent national authorities in three (3) Member States of the European Union and with the support of the National competent authorities. Testing will be carried out in accordance with the requirements of section 7 “Time schedule and reporting” of these specifications. Bids must contain evidence of the tenderer’s ability to perform the tasks set out in section 5.1 of these specifications, the rigour of the proposed approach (methodology) and the ability to meet the requirements expressed in section 3 “Subject of the contract”, as well as a draft list of contents of the proposed modular guide and the work plan, which will be among the factors governing the award of the contract.

Tenderers may choose not to give full details of their methodology unless they are awarded the contract. But in their bid they **must clearly indicate** the fundamental elements of the methodology allowing the objectives set out in section 3 of these specifications to be achieved. In this case, they must indicate their intention in their bid, and include a summary of the methodology.

The methodology must enable the identification, analysis and assessment of the various elements cited in sections 3 and 5.1 of these specifications and should not be restricted to documentary identification and analysis. It must also show the approach envisaged and its suitability for reflecting correctly the requirements expressed in sections 3 and 5.1 as well as the draft list of contents of the modular guide and the work plan, which will be among the factors governing the award of the contract. The methodology described above and the work plan proposed will be among the factors governing the award of the contract.



### 5.3. Guide to how the activities will be carried out

The PROGRESS Programme aims to promote gender mainstreaming in all its five policy sections and commissioned activities. Consequently, the Contractor shall 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 the women and men dimension;
- Performance monitoring includes the collection and gathering of data disaggregated by sex when needed;
- Its proposed team and/or staff respect the gender balance at all levels.

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

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

The Contractor will be required to detail in its final activity report the steps and achievements made towards meeting these contractual requirements.

## 6. SKILLS AND PROFESSIONAL QUALIFICATIONS REQUIRED

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

### Additional requirements:

To carry out these tasks, tenderers must show that they have a team with confirmed experience in the specific field of assessment of WRVS, the ability to propose measures to prevent and/or tackle these risks, together with a good knowledge of Community legislation on occupational health and safety aspects related to work related vehicle risk management and the application of means of preventing these risks.

To carry out the tasks described in order to achieve the objectives set out in section 3 of these specifications, tenderers must have a team with proven competence and confirmed experience in the following specific areas:

- identification and prevention of risks to workers associated with coming into contact with vehicles whilst working;
- in-depth knowledge of the Framework Directive 89/391/EEC and the other Community Directives on health and safety at work applicable to workers using vehicles, in particular the definitions, tasks and responsibilities of the various players;
- establishing of “**safety and health plans**”, including risk assessment as a function of the risks to which workers using vehicles are exposed, and the measures to be proposed to prevent and/or tackle those WRVR;
- selection and use of appropriate work equipment and personal protective equipment (where necessary);
- provision of instruction and preparation of modular guides to good practice aimed at a target group with different levels of training, education and understanding, particularly immigrants, using video clips, diagrams and pictograms.

In particular, the team must be familiar with the problems of small and medium-sized enterprises, micro-enterprises and family or artisanal firms.

## 7. TIME SCHEDULE AND REPORTING

*See also Article I.2. of the draft contract.*

### 7.1. Specific deadlines for the performance of tasks:

The work must be completed within a maximum of **twenty (24) months** from the date on which the contract is signed. It will include the following stages:

(1) No more than thirty **(30) days after** signature of the contract, the contractor must submit to the European Commission (Unit EMPL B/3) a detailed document relating to the methods and approach presented in the bid, together with the work schedule, which will then be assessed by the “Monitoring Committee” (MC) at its first meeting.

(2) During the subsequent **two months**, the contractor must give a presentation to the Commission and the “Monitoring Committee” (MC) on the aspects referred to in section 5.1 at an initial meeting organised by the European Commission (Unit EMPL B/3) in Luxembourg. The contractor must attend this initial meeting of the MC and the other meetings referred to in these specifications and must take account of the MC’s suggestions and recommendations during the progress of the work on the preparation of the draft modular guide. Details of the methods, the approach to be followed and the work plan must be submitted by the contractor in English.

(3) The contractor must meet periodically with the Commission and the MC to discuss progress and the content of the draft modular guide [**twelve (12) meetings: six (6) with the Commission (Unit EMPL B/3) the day before the six (6) with the MC**].

(4) No more than **eight (8) months** after signature of the contract, the contractor must submit an interim report in English to the European Commission (Unit EMPL B/3), describing the progress of the work in relation to the envisaged timetable. This report must contain a summary of the results to date and a copy of the draft modular guide as it stands. The Commission (Unit EMPL B/3) will submit this report to the MC within 15 days of receiving it, for discussion and possible amendment at one of the six (6) meetings with the MC provided for in these specifications. The conclusions of the meeting with the MC will be taken into account by the contractor in his work to prepare the draft modular guide and the final report.

(5) **Twelve (12) months** after signature of the contract, the contractor must test the draft modular guide at **the three (3) types of vehicle user location and/or activity** selected, as indicated in section 5.1 (6) of these specifications.

(6) **Sixteen (16) months** after signature of the contract, the contractor must submit a preliminary draft final report in English to the European Commission (Unit EMPL B/3). This preliminary draft final report will contain the final draft of the modular guide together with the documents collected as basic elements as defined in sections 3 and 5.1 of these specifications.

This preliminary draft final report (in English) will be discussed by the MC at a meeting held in Luxembourg within 15 days of its receipt by the Commission (Unit EMPL B/3). The conclusions of the meeting of the MC will be taken into account by the contractor in preparing the draft final report.

(7) **Eighteen (18) months** after signature of the contract, the contractor must submit a draft final report in English to the European Commission (Unit EMPL B/3). This draft final report (in English) will contain the final draft of the guide (in English) together with all the documents collected as basic elements for preparing the final draft of the modular guide and the standards, directives and literature, as defined in sections 3 and 5.1 of these specifications.

(8) The European Commission (Unit EMPL B/3) may transmit objections and comments to the contractor within **sixty (60) days** of receipt of the draft final report. The contractor will then have **sixty (60) days to**

**present a new final report**, in English, taking these objections and comments into account or presenting another point of view. When submitting the final report, the contractor may obtain written confirmation of acceptance.

**(9) Sixty (60) days after submission of the draft final report**, and in the absence of objections and/or comments from the European Commission (Unit EMPL B/3), the contractor must submit the final report containing the draft final guide in English.

The contractor must present the final report containing the various elements referred to in sections 5 and 7 of these specifications. The draft modular guide must be provided in a fully functional electronic form, interactive enough so that users – regardless of their technical skills – can easily access the required information.

**NB:**

The electronic draft final report and the final report must include a brief summary in English of the main results obtained. A slide show type presentation using Commission approved layout which will be provided to the contractor of the key points of the results must accompany the summary. This would typically be for a presentation lasting 20 to 30 minutes along with the appropriate speaking notes.

The key points should be concise, clear and easy to understand. They must be drafted in English, French and German. Other Community languages will be appreciated, but are not compulsory. The detailed methodology and work plan, together with the various reports and draft reports referred to in this section, must also be submitted to the European Commission (Unit EMPL B/3) both on paper (in triplicate) and in a widely-used electronic format (CD-ROM or DVD).

The contractor must also supply a copy of the information collected as mentioned in sections 5 and 7 and used in preparing the draft guide and the final report. The video clips pictograms, pictures, graphics and other illustrations must also be presented in a widely-used electronic format.

## **7.2. Publicity and information requirements**

In accordance with the General conditions, all contractors are under the obligation to acknowledge that the present service has received funding from the Union 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 the European Union Programme for Employment and Social Solidarity – PROGRESS, the following formulation shall be used:

*This (publication, conference, training session etc) is commissioned by the European Union Programme for Employment and Social Solidarity - PROGRESS (2007-2013).*

*This programme is implemented by the European Commission. It was established to financially support the implementation of the objectives of the European Union in the employment, social affairs and equal opportunities area, and thereby contribute to the achievement of the Europe 2020 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.*

For more information see: <http://ec.europa.eu/progress>

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 activity, the Contractor will insert the European Union logo and mention the European Commission as the Contracting Authority in every publication or related material developed under the present contract.

### 7.3 Reporting requirements

PROGRESS is implemented through a results-based management - RBM. Managing for outcomes and results is about working to maximise results for European citizens. This includes:

- Identifying the most important results for European citizens;
- Managing these results, including setting out clearly the desired results, implementing plans based upon these results and learning about 'what works' in the process;
- Seizing opportunities to work together whenever this helps achieve the results.

The Strategic Framework, developed in collaboration with Member States and civil society organisations, sets out the intervention logic for Progress-related expenditure and defines PROGRESS' mandate and its long-term and immediate outcomes. It is supplemented by performance measures which serve to determine the extent to which PROGRESS has delivered the expected results. See in Annex the overview of PROGRESS performance measurement framework. For more information on the strategic framework, please visit PROGRESS website <http://ec.europa.eu/social/main.jsp?catId=659&langId=en>.

The Commission regularly monitors the effect of PROGRESS-supported or commissioned initiatives and considers how they contribute to PROGRESS outcomes as defined in the Strategic Framework. In this context, the Contractor will be asked to dedicatedly work in close cooperation with the Commission and/or persons authorised by it to define the expected contribution and the set of performance measures which this contribution will be assessed against. The Contractor will be asked to collect and report on its own performance to the Commission and/or persons authorised by it against a template which will be annexed to the contract. In addition, the Contractor will make available to the Commission and/or persons authorised by it all documents or information that will allow PROGRESS performance measurement to be successfully completed and to give them the necessary rights of access.

## 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".

### 8.1. Pre-financing

Following signature of the contract by the last contracting party, a pre-financing payment equal to 30% of the total referred to in Article 1.3.1 of the model contract will be paid within **30 days** of the date of receipt of a request for pre-financing, accompanied by a corresponding invoice.

### 8.2 Interim payment

The contractor can request an interim payment. To be acceptable, such request must be accompanied by:

- an interim report in accordance with the instructions laid down in section 7;
- the relevant invoices;
- statements of reimbursable expenditure in accordance with Article II.7 of the draft contract.

The report must have been approved by the Commission. The Commission has **60 days** from receipt of the report to approve or reject it, and the contractor has **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 a **maximum of 40%** of the total amount referred to in Article I.3.1 of the draft contract shall be made.

### 8.3 Payment of the balance

To be acceptable, the contractor's request for payment of the balance must be accompanied by:

- the final report in accordance with the instructions laid down in section 7;

- the relevant invoices;
- statements of reimbursable expenditure in accordance with Article II.7 of the draft contract.

The said report must have been approved by the Commission. After receiving the report, the Commission has **60 days** in which to accept or reject it, and the contractor has **30 days** in which to submit new documents. The balance corresponding to the relevant invoices will be paid within **30 days** following the date of approval of the report by the Commission.

## 9. PRICES

Under the terms of Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union, 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.

### ■ Part A: Fees and direct costs

- Fees, expressed in number of person/days and unit price per working day for each expert proposed. The unit price covers the experts' fees and administrative expenditure, but not the reimbursable expenses referred to below.
- Translation costs, where applicable.
- Other direct costs (please specify).

### ■ Part B: Reimbursable expenses

- Travel expenses (not including local transport)
- Subsistence expenses of the contractor and his personnel (covering expenditure incurred by experts on short trips away from their normal place of work) — see Annex III to the model contract
- Expenses for the shipment of equipment or unaccompanied luggage, directly connected with performance of the tasks specified in Article I.1 of the draft contract
- Contingencies.

Total price = Part A + Part B **with a maximum of 400,000 €**

## 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 contract<sup>12</sup>. 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 liabilities towards the Commission.

<sup>12</sup> 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.

## 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 situation 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) they are currently subject to an administrative penalty referred to in Article 96(1)<sup>13</sup>.

### Article 94 :

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

- a) are subject to a conflict of interest;
- b) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or fail to supply this information (...)"

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 Implementing Rules – Evidence

§3. The contracting authority shall accept as satisfactory evidence that the candidate or tenderer to whom the contract is to be awarded is not in one of the situations described in point (a), (b) or (e) of Article 93(1) of the Financial Regulation, a recent extract from the judicial record or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. 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(1) of the Financial Regulation, a recent certificate issued by the competent authority of the State concerned.

Where the document or certificate is not 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.

§4. Depending on the national legislation of the country in which the candidate or tenderer is established, the documents referred to in paragraph 3 shall relate to legal persons and/or natural persons including, where

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<sup>13</sup> Cf. Article 96(1): "The contracting authority may impose administrative or financial penalties on the following:

(a) candidates or tenderers in the cases referred to in point (b) of Article 94;

(b) contractors who have been declared to be in serious breach of their obligations under contracts covered by the budget.

(...)"

considered necessary by the contracting authority, company directors or any person with powers of representation, decision-making or control in relation to the candidate or 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**

All bids must also contain the documents listed below, testifying to the tenderer's financial and economic capacity, technical capability and professional qualifications. In particular, the European Commission will verify the following:

### **12.1 Financial and economic capacity (on the basis of the following documents)**

- turnover during the previous financial year (statement of overall turnover – at least twice the value of the contract, i.e. € 800,000 -)
- balance sheets and profit and loss accounts for the last three financial years, if the legislation of the country in which the tenderer is established requires them to be published;
- regular accounts for the quarter preceding that in which the tender notice was published, if the full accounts for the previous financial year are not yet available.

If, for some exceptional reason which the contracting authority considers justified, the tenderer or candidate is unable to provide the references requested by the contracting authority, he may prove his economic and financial capacity by any other means which the contracting authority considers appropriate.

### **12.2 Tenderer's technical capability**

- a description of the tenderer's technical capability and practical experience in the field referred to in section 6 of these specifications. For consortia of companies or groups of service providers, this description must relate specifically to the tasks to be performed by each of their members;
- a list of work and/or publications of last 3 years demonstrating the tenderer's practical experience in the fields referred to in section 6 of these specifications
- the tenderer must provide the names and CVs (maximum of three pages each) of the persons responsible for the specific tasks described in section 5 of these specifications, with a view to demonstrating their practical experience and their capability to prepare practical guidelines.
- a description of the parts of the services to be provided by each consortium of companies or groups of service providers (where applicable).

### 13. Award criteria

The contract will be awarded to the bid offering the best price/quality ratio, taking into account the following criteria :

- Understanding of the scope of work, objectives and tasks: **20 points**
- Quality and consistency of the methodological approach, taking into account any particularities of this specific project and including a description of the tangible results which will be delivered: **40 points**
- Quality of the work plan proposed: **20 points**
- Organisation of the work and management of the project: **20 points**

The contract will *not* be awarded to a tenderer whose bid receives less than (70%) for the award criteria. The points total will then be divided by the price, with the highest-scoring bid being chosen.

### 14. Content and presentation of bids

#### 14.1 Content of bids

Tenders must include:

- 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);
- a bank ID form duly completed and signed by the bank;
- a "legal entity" form duly completed;
- the price;
- the detailed CVs of the proposed experts;
- the name and function of the contractor's legal representative (i.e. the person authorised to act on behalf of the contractor in any legal dealings with third parties);
- proof of eligibility: tenderers must indicate the State in which they have their registered office or are established, providing the necessary supporting documents in accordance with their national law.

#### 14.2 Presentation of bids

Bids must be submitted in triplicate (i.e. one original and two copies).

They must include all the information required by the Commission (see points 9, 10, 11 and 12 above).

They must be clear and concise.

They must be signed by the legal representative.

They must be submitted in accordance with the specific requirements of the invitation to tender, within the deadlines laid down.



## Annex I

Exclusion criteria (Article 93(1) FR)	Supporting documents to be provided by applicants, tenderers or tenderers to who the contract will be awarded	
	Procurement (Article 93(2) FR; Article 134 IR)	
<b>1. Exclusion from a procurement procedure, Article 93(1) FR :</b> « Candidates or tenderers shall be excluded from participation in a procurement procedure if:		
<b>1.1. (subparagraph a)</b> <i>they are bankrupt or being wound up,</i>  <i>are having their affairs administered by the courts,</i>  <i>have entered into an arrangement with creditors have suspended business activities, are the subject of proceedings concerning those matters,</i>  <i>or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations<sup>14</sup>;</i>	- Recent extract from the judicial record <b>or</b> recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance <b>or</b> - Where no such certificate is issued in the country concerned : 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	
<b>1.2. (subparagraph b)</b> <i>they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata<sup>15</sup>;</i>	Cf. supporting documents for Article 93(1)(a) FR above	
<b>1.3. (subparagraph c)</b> <i>they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;</i>	Declaration by the candidate or tenderer that he is not in the situation described	
<b>1.4. (subparagraph d)</b> <i>they have 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 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<sup>16</sup>;</i>	Recent certificate issued by the competent authority of the State concerned confirming that the candidate is not in the situation described <b>or</b> Where no such certificate is issued in the country concerned : 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	
<b>1.5. (subparagraph e)</b> <i>they have been the subject of a judgment 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<sup>17</sup>;</i>	Cf. supporting documents for Article 93(1)(a) FR above	
<b>1.6. (subparagraph f)</b> <i>they are currently subject of an administrative penalty referred to in Article 96(1)<sup>18</sup>. »</i>	Declaration by the candidate or tenderer that he is not in the situation described	

<sup>14</sup> See also Article 134(3) IR : Depending on the national legislation of the country in which the tenderer or candidate is established, the documents referred to in paragraphs 1 and 2 shall relate to legal persons and/or natural persons including, where considered necessary by the contracting authority, company directors or any person with powers of representation, decision-making or control in relation to the candidate or tenderer.

<sup>15</sup> Cf. footnote n° 14.

<sup>16</sup> Cf. footnote n° 14

<sup>17</sup> Cf. footnote n° 14

<sup>18</sup> Article 96(1) FR: The contracting authority may impose administrative or financial penalties on the following:

(a) candidates or tenderers in the cases referred to in point (b) of Article 94;

(b) contractors who have been declared to be in serious breach of their obligations under contracts covered by the budget.

Exclusion criteria (Article 94 FR)	Supporting documents to be provided by applicants, tenderers or tenderers to who the contract will be awarded	
	Procurement	Grants
<b>2. Exclusion from a procurement or grant award procedure Article 94 FR :</b> « <i>Contracts may not be awarded to candidates or tenderers who, during the procurement procedure:</i>		
<b>2.1. (subparagraph a)</b>  <i>are subject to a conflict of interest;</i>	statement by the applicant, tenderer or bidder confirming the absence of conflict of interests, to be submitted with the application, bid or proposal	
<b>2.2. (subparagraph b)</b> <i>are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information»<sup>19</sup>.</i>	No specific supporting documents to be supplied by the applicant, tenderer or bidder  It is the responsibility of the authorising officer, represented by the evaluation committee, to check that the information submitted is complete <sup>20</sup> and to identify any misrepresentation	

<sup>19</sup> Cf. Article 146(3) of the FR Implementing Rules: « ...the evaluation committee may ask candidates or tenderers to supply additional material or to clarify the supporting documents submitted in connection with the exclusion and selection criteria, within the time limit it specifies. » and Article 178(2) of the FR Implementing Rules: « The evaluation committee may ask an applicant to provide additional information or to clarify the supporting documents submitted in connection with the application, in particular in the case of obvious clerical errors. »

<sup>20</sup> Cf. footnote n°19

## Annex II

### **Declaration of honour with respect to the Exclusion Criteria and absence of conflict of interest**

The undersigned [*name of the signatory of this form, to be completed*]:

- in his/her own name (*if the economic operator is a natural person or in case of own declaration of a director or person with powers of representation, decision making or control over the economic operator<sup>21</sup>*)

or

- representing (*if the economic operator is a legal person*)

official name in full (*only for legal person*):

official legal form (*only for legal person*):

official address in full:

VAT registration number:

declares that the company or organisation that he/she represents / he/she:

- a) is not bankrupt or being wound up, is not having its affairs administered by the courts, has not entered into an arrangement with creditors, has not suspended business activities, is not the subject of proceedings concerning those matters, and is not in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) has not been convicted of an offence concerning professional conduct by a judgment which has the force of *res judicata*;
- c) has not been guilty of grave professional misconduct proven by any means which the contracting authorities can justify;
- d) has fulfilled all its obligations relating to the payment of social security contributions and the payment of taxes in accordance with the legal provisions of the country in which it is established, with those of the country of the contracting authority and those of the country where the contract is to be carried out;
- e) has not 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) is not a subject of the administrative penalty for being guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or failing to supply an information, or being declared to be in serious breach of his obligation under contract covered by the budget.

In addition, the undersigned declares on their honour:

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<sup>21</sup> To be used depending on the national legislation of the country in which the candidate or tenderer is established and where considered necessary by the contracting authority (see art. 134(4) of the Implementing Rules).

- g) they have no conflict of interest in connection with the contract; a conflict of interest could arise in particular as a result of economic interests, political or national affinities, family or emotional ties or any other relevant connection or shared interest;
- h) they will inform the contracting authority, without delay, of any situation considered a conflict of interest or which could give rise to a conflict of interest;
- i) they have not made and will not make any offer of any type whatsoever from which an advantage can be derived under the contract;
- j) they have not granted and will not grant, have not sought and will not seek, have not attempted and will not attempt to obtain, and have not accepted and will not accept any advantage, financial or in kind, to or from any party whatsoever, constituting an illegal practice or involving corruption, either directly or indirectly, as an incentive or reward relating to award of the contract;
- k) that the information provided to the Commission within the context of this invitation to tender is accurate, sincere and complete;
- l) that in case of award of contract, they shall provide upon request the evidence that they are not in any of the situations described in points a, b, d, e above.

For situations described in (a), (b) and (e), production of a recent extract from the judicial record is required or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. Where the Tenderer is a legal person and the national legislation of the country in which the Tenderer is established does not allow the provision of such documents for legal persons, the documents should be provided for natural persons, such as the company directors or any person with powers of representation, decision making or control in relation to the Tenderer.

For the situation described in point (d) above, recent certificates or letters issued by the competent authorities of the State concerned are required. These documents must provide evidence covering all taxes and social security contributions for which the Tenderer is liable, including for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions.

For any of the situations (a), (b), (d) or (e), where any document described in two paragraphs above is not 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.]

By signing this form, the undersigned acknowledges that they have been acquainted with the administrative and financial penalties described under art 133 and 134 b of the Implementing Rules (Commission Regulation 2342/2002 of 23/12/02), which may be applied if any of the declarations or information provided prove to be false.

Full name

Date

Signature

## Overview of PROGRESS Performance Measurement Framework

**PROGRESS Ultimate Outcome**  
*Member States implement laws, policies and practices in a manner that contributes to the desired outcomes of the Social Agenda*

PROGRESS works towards its ultimate outcome by helping strengthen the EU’s support for Member States' efforts to create more and better jobs and to build a more cohesive society. PROGRESS seeks to contribute to (i) an **effective legal regime** in the EU in relation to the Social Agenda; (ii) **shared understanding** across the EU with regard to Social Agenda objectives; and (iii) **strong partnerships** working towards Social Agenda objectives.

In operational terms, support provided by PROGRESS facilitates (i) provision of analysis and policy advice; (ii) monitoring and reporting on the implementation of EU legislation and policies; (iii) policy transfer, learning and support among Member States; and (iv) relaying to decision-makers the views of the stakeholders and society at large.

<b>Legal Regime Outcome:</b> <i>Compliance in Member States with EU law related to PROGRESS areas.</i> <b>Performance Indicators</b>	<b>Shared Understanding Outcome:</b> <i>Shared understanding and ownership among policy/decision-makers and stakeholders in Member States, and the Commission, of objectives related to PROGRESS policy areas.</i> <b>Performance Indicators</b>	<b>Strong Partnerships Outcome:</b> <i>Effective partnerships with national and pan-European stakeholders in support of outcomes related to PROGRESS policy areas.</i> <b>Performance Indicators</b>
<ol style="list-style-type: none"> <li>1. Transposition rate of EU law on matters related to PROGRESS policy areas</li> <li>2. Effectiveness of application in Member States of EU law on matters related to PROGRESS policy areas.</li> <li>3. EU policies and legislation are grounded in thorough analysis of situation and responsive to conditions, needs and expectations in Member States in PROGRESS areas</li> <li>4. Extent to which PROGRESS-supported policy advice feeds into the development and implementation of EU legislation and policies</li> <li>5. Cross-cutting issues are addressed in PROGRESS policy sections</li> <li>6. EU policies and legislation display a common underlying logic of intervention in relation to PROGRESS issues</li> <li>7. Gender mainstreaming is systematically promoted in PROGRESS</li> </ol>	<ol style="list-style-type: none"> <li>1. Attitudes of decision-makers, key stakeholders and general public regarding EU objectives in PROGRESS policy areas</li> <li>2. Extent to which national policy discourses or priorities reflect EU objectives</li> <li>3. Extent to which principles of good governance (including minimum standards on consultation) are respected in policy debate</li> <li>4. Extent to which the outcomes of policy debates feed into the development of EU law and policy.</li> <li>5. Greater awareness of policy-and decision-makers, social partners, NGOs, networks regarding their rights/obligations in relation to PROGRESS policy areas</li> <li>6. Greater awareness of policy-and decision-makers, social partners, NGOs, networks regarding EU objectives and policies in relation to PROGRESS policy areas</li> </ol>	<ol style="list-style-type: none"> <li>1. Existence of common ground/consensus among policy and decision-makers and stakeholders on EU objectives and policies</li> <li>2. Identification and involvement by the EU of key actors in a position to exert influence or change at EU and national levels</li> <li>3. Effectiveness of partnerships in relation to outcomes related to PROGRESS policy areas.</li> <li>4. Number of individuals served or reached by networks supported by PROGRESS.</li> <li>5. Extent to which advocacy skills of PROGRESS-supported networks have improved</li> <li>6. Satisfaction of EU and national authorities with the contribution of networks</li> <li>7. Extent to which PROGRESS-supported networks take a cross-cutting approach</li> </ol>

**Specifications for the layout design, technical requirements and formatting requirements.**



colour\_Social  
Europe\_word doc ...

For each photo or video clip used the following information must be provided in a separate file:

- Date
- Location
- Name of photographer
- Copyright owner
- Keywords
- Alternative text or legend
- Size
- Format (jpg, gif, etc.)
- Size (MB)
- Resolution (minimum 300 dpi)

The contractor must provide the guide in xml format, a format which structures the text in a way which will allow us later to turn the guide into various formats (the traditional pdf format, an e-book, an app ...)

The contractor must provide the images separately in high resolution, to allow for optimum display on a variety of screen sizes and resolutions as well as for good quality printing

All tables and graphs should be provided as separate .xls files

Video clip should be provided in avi or mpeg 4 or any suitable format depending on the technological evolution.

**Specific activities to be developed in the non-binding good practice guide.**

The following list gives an indication of the specific tasks or activities that need to be developed as an individual non-binding good practice data sheet.

Safety management	Journey Management
<ol style="list-style-type: none"> <li>1. Regulation</li> <li>2. Business Case to be aimed at the CEO or equivalent level</li> <li>3. Board level champion</li> <li>4. Safety Leadership</li> <li>5. Clear goals</li> <li>6. Safety Culture/goals</li> <li>7. Management structure</li> <li>8. Working with other employers</li> <li>9. Working with insurer</li> <li>10. Safety committee</li> <li>11. Consultation and continual involvement of Workers and their representatives</li> <li>12. Focus group discussions</li> <li>13. Safety Representatives</li> <li>14. Employer Safety Policies</li> <li>15. Data and Monitoring</li> <li>16. Safety audit</li> <li>17. Claims data analysis</li> <li>18. Monitoring and Evaluating Performance:</li> <li>19. Policy and processes to report, record and investigate incidents</li> <li>20. Performance Management. Key Performance Indicators [KPI]</li> <li>21. Evaluation, KPI benchmarking.</li> <li>22. Safety program development</li> <li>23. Risk Assessment</li> <li>24. Supply chain safety</li> <li>25. GDE Matrix</li> <li>26. Haddon Matrix</li> </ol>	<ol style="list-style-type: none"> <li>1. Need to travel</li> <li>2. Travel Plan/policy</li> <li>3. Travel modal choice</li> <li>4. Avoid risk: use of alternative technologies, (switch face to face meeting to web-conference, good preparation to avoid repeat travel, etc.)</li> <li>5. Route selection</li> <li>6. Route planning</li> <li>7. Route risk assessment</li> <li>8. Journey Planning</li> <li>9. Transport of passengers</li> <li>10. Implementation</li> <li>11. Incentives for active/safer travel</li> <li>12. Working from Home</li> </ol>
<p><b>Managing Speed:</b></p> <ol style="list-style-type: none"> <li>1. Vehicle specification</li> <li>2. Policy</li> <li>3. Speed Limit</li> <li>4. Average Speed</li> <li>5. Appropriate Speed</li> <li>6. Speed Limiter</li> <li>7. Intelligent Speed Adaption</li> <li>8. Telematics where speed versus speed limit can be measured</li> <li>9. Event Data Recorders</li> <li>10. Eco-driving</li> <li>11. Thinking/Braking/Stopping Distance</li> <li>12. Just-in-time management</li> <li>13. Enforcement</li> <li>14. Sanctions/rewards</li> </ol>	<p><b><u>Supporting worker travel methods:</u></b></p> <ol style="list-style-type: none"> <li>13. Needs and Requirements</li> <li>14. Analysis</li> <li>15. Setting Goals and Targets</li> <li>16. Measures</li> <li>17. Monitoring and Review</li> <li>18. Staff Involvement</li> <li>19. Car Parking</li> <li>20. Vehicle types: Powered Two Wheelers, Cycling, Company Cars, Grey Fleet</li> <li>21. Car Pooling</li> <li>22. Public Transport</li> <li>23. Shuttle Services</li> <li>24. Cycle Buddy</li> <li>25. Cycle Bus Scheme</li> <li>26. Safer Routes for Pedestrians and Cyclists along commuting routes</li> <li>27. Company bikes&gt;Showers/Secure Bike Storage Space</li> <li>28. Walking</li> <li>29. Flexi Time</li> <li>30. Shift Work</li> <li>31. Land Use Planning</li> <li>32. ITS to support management of commuting risk</li> <li>33. Urban Mobility Patterns</li> </ol>

15. Training/re-training 16. Rehabilitation 17. Safety Culture 18. Awareness Campaigns	
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Safe driver	Safe vehicle
<ol style="list-style-type: none"> <li>1. Driver Selection and recruitment</li> <li>2. Driver Interview</li> <li>3. Driver contract</li> <li>4. Driver Induction</li> <li>5. Basic Skills</li> <li>6. Driver Feedback</li> <li>7. Refresher Training</li> <li>8. Women drivers</li> <li>9. Defensive Driving</li> <li>10. Driver protective equipment</li> </ol> <p><b>Driver management</b></p> <ol style="list-style-type: none"> <li>1. rostering</li> <li>2. Monitoring</li> <li>3. evaluation</li> <li>4. Education and Information to Drivers</li> <li>5. Coaching vs. Teaching</li> <li>6. Driver behaviour, transfer of skills to family and community engagement.</li> <li>7. Training needs and assessment as part of driver monitoring</li> <li>8. Education and Campaigns</li> <li>9. Driver handbook</li> <li>10. Work instructions</li> <li>11. Engage and encourage</li> <li>12. Code of conduct</li> <li>13. Emergency plans for breakdowns and incidents</li> <li>14. Incident reporting measures</li> <li>15. Reporting and investigation of driver element of incident data</li> <li>16. Driver debrief and corrective action</li> <li>17. Driver elements of collision data</li> <li>18. Counselling, trauma management and support</li> <li>19. Driver reassessment and retraining</li> </ol> <p><b>Driver Risk Assessment</b></p> <ol style="list-style-type: none"> <li>1. Fleet drivers</li> <li>2. Grey Fleet Drivers</li> <li>3. Professional drivers [HGV and Buses]</li> <li>4. Directive on Initial Qualification and periodic Training of Drivers of Certain Vehicles (2003/59)</li> <li>5. Attitude and management culture based programme</li> <li>6. Management Interventions</li> <li>7. Determining the appropriate interventions</li> <li>8. Training of drivers</li> <li>9. Risk management</li> </ol>	<ol style="list-style-type: none"> <li>1. Vehicle standards</li> <li>2. Vehicle Selection related to safety specification</li> <li>3. Vehicle Maintenance. Servicing, inspection and repairs.</li> <li>4. Risk assessment by fleet type <ol style="list-style-type: none"> <li>a. Grey fleet</li> <li>b. Vans</li> <li>c. HGVs</li> <li>d. LGV</li> <li>e. Bus</li> <li>f. Taxi</li> <li>g. motorcycles,</li> </ol> </li> <li>5. Vehicle Ergonomics: Driver seat comfort, Access to driver seat, Access to load area.</li> <li>6. Mobile communication and navigation policy</li> <li>7. Telemetry data capture</li> <li>8. Review vehicle elements of incident data</li> </ol> <p><b><u>Safety equipment:</u></b></p> <ol style="list-style-type: none"> <li>9. Active and passive safety features</li> <li>10. Vehicle Equipment Procurement EuroNCAP rating,</li> <li>11. Seat Belt Reminders,</li> <li>12. Alcohol interlocks,</li> <li>13. Telemetries related to driver behaviour,</li> <li>14. Event Data Recorders,</li> <li>15. Intelligent Speed Assistance ESC,</li> <li>16. Speed Limiters,</li> <li>17. Lane Departure Assistance,</li> <li>18. Safe distance Assistance,</li> <li>19. Tyre characteristics: summer/winter tyres, limit date of utilisation, Tyre pressure, load and speed rating etc.</li> <li>20. Auxiliary devices for improved visibility. E.g. Reversing cameras</li> <li>21. Ancillary safety equipment e.g. high-visibility jackets, tyre pressure &amp; tread depth gauges etc.,</li> <li>22. Brief Examples of their use in companies so far</li> <li>23. Managing Staff and Use of In-Vehicle Safety Technology</li> <li>24. Downside of technologies and potential barriers</li> <li>25. Data Security and Protection and Liability Issues</li> </ol>



<p><b>Training of Managers and Supervisors</b></p> <ol style="list-style-type: none"> <li>1. Performance Evaluation Data</li> <li>2. Supervisor Feedback</li> <li>3. Support to Union Officials</li> <li>4. Accredited Trainers</li> </ol> <p>Fitness to Drive and driver wellbeing</p> <ol style="list-style-type: none"> <li>1. Workplace Health Promotion</li> <li>2. Fatigue</li> <li>3. Natural Sleep Pattern</li> <li>4. Medical Check: physical, mental and eyesight</li> <li>5. Working Hours</li> <li>6. Travel after work (e.g. to appointments)</li> <li>7. Night Work</li> <li>8. Shift Work</li> <li>9. Alcohol and Work Related Road Safety</li> <li>10. Drink Driving Limit</li> <li>11. Enforcement</li> <li>12. Alcohol and Drugs Policy in the Work Place</li> <li>13. Driving under influence of Illegal drugs</li> <li>14. Driving under influence of prescription or over the counter medicines</li> <li>15. Workplace Drug and Alcohol Testing</li> </ol> <p><b>Social Rules and passenger and HGV drivers</b></p> <p><b>Fatigue:</b></p> <ol style="list-style-type: none"> <li>1. Tachograph</li> <li>2. Directive (Working Time)</li> <li>3. Regulation</li> <li>4. Liability</li> <li>5. Just-in-time management</li> <li>6. Compliance</li> <li>7. Fraud</li> <li>8. Enforcement/ Control officers</li> <li>9. Fatigue management Systems</li> <li>10. Risk Rating</li> <li>11. Social Rules</li> <li>12. Training</li> <li>13. Fines</li> <li>14. Sanctions</li> <li>15. Infringement</li> </ol>	<p><b>Distraction</b></p> <ol style="list-style-type: none"> <li>26. Physical, Visual, Auditory, Cognitive Distraction</li> <li>27. Nomadic Devices</li> <li>28. Portable Navigation Devices (PND)</li> <li>29. Intelligent Transport Systems (ITS)</li> <li>30. Telemetries</li> <li>31. Hands-free, Hand-held</li> <li>32. Stopping Distances</li> <li>33. Rehabilitation</li> <li>34. Ban</li> <li>35. Sanctions</li> <li>36. Training</li> </ol>
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Safe workplace	
Fixed workplace	Work on or near the Road
<ol style="list-style-type: none"> <li>1. Site layout and design</li> <li>2. Site signs</li> <li>3. Risk assess work processes</li> <li>4. Hot spot mapping and hazard identification</li> <li>5. Guidelines and rules</li> <li>6. Work activities               <ol style="list-style-type: none"> <li>a. Loading and unloading</li> <li>b. Reversing</li> <li>c. Manoeuvring</li> <li>d. Coupling and uncoupling</li> <li>e. Delivering/collecting</li> </ol> </li> <li>7. Traffic management systems</li> <li>8. Pedestrian routes</li> <li>9. Designated parking and work areas</li> <li>10. Delivery/collection access</li> <li>11. On-site traffic management</li> <li>12. Facility planning e.g. visual, warning devices, surfaces, edge protection etc.</li> <li>13. On site transport methods (cycles/bus/walkways etc.)</li> <li>14. Transport interface</li> <li>15. Security of drivers,</li> <li>16. Safety and Security of loads,</li> <li>17. Rest facilities for drivers (internal or visiting worker)</li> <li>18. Managing activities relating to particular vehicle types               <ol style="list-style-type: none"> <li>a. Fork lift operation</li> <li>b. Other wheeled machines (special cases)</li> <li>c. Containers (including fumigation)</li> <li>d. Curtain sided vehicles</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>1. Risk assess work processes</li> <li>2. Guidelines and rules</li> <li>3. ID worker types at risk               <ol style="list-style-type: none"> <li>a. Road infrastructure repair and maintenance</li> <li>b. Traffic signs and signals maintenance</li> <li>c. Emergency responders</li> <li>d. Enforcement personnel</li> </ol> </li> <li>4. Nature of risk exposure</li> <li>5. Worksite layout and design</li> <li>6. Signs and signals</li> </ol> <p><b>Road Work Zones</b></p> <ol style="list-style-type: none"> <li>7. Scheduling and linking of work activities in a geographical area.</li> <li>8. Road Work Zone</li> <li>9. Safety Appraisal</li> <li>10. Risk Assessment</li> <li>11. Safety Plan</li> <li>12. Transport Management Planning</li> <li>13. Design and Layout</li> <li>14. Speed Management</li> <li>15. Enforcement</li> <li>16. Signage</li> <li>17. Audit</li> <li>18. Monitoring</li> <li>19. Management</li> <li>20. Asset management</li> <li>21. Performance Goals</li> <li>22. Procurement</li> <li>23. Life cycle Planning</li> <li>24. Transport Network</li> <li>25. Variable Message Signs</li> <li>26. Truck Mounted Attenuators</li> <li>27. Traffic flows, volume, efficiency</li> <li>28. Educating workers on their conspicuousness to others</li> </ol> <p><b>Mobile or limited duration work zones:</b></p> <ol style="list-style-type: none"> <li>29. Refuse collection and delivery</li> <li>30. Utility repairs</li> <li>31. Tradesmen</li> <li>32. Delivery vehicles</li> <li>33. Visibility (worker and workplace)</li> <li>34. Emergency responders</li> <li>35. Enforcement personnel</li> </ol>