
Specifications – Invitation to tender No **VT/2006/015**

Study of compilation of the Disability statistical data coming from the administrative registers of the Member States

Budget heading 04.04.04

1. *Title of the contract*

Study on the Disability statistical data coming from the administrative registers of the Member States - VT/2006/015 – (Pre-information notice published on **22 March 2006 2006/S.56-057874**)

2. *Background*

Persons with disabilities are generally included as one of the groups who are at a disadvantage. The European Union's long-term strategy is to provide persons with disabilities with equal opportunities. The Commission recently launched the Disability Action Plan for 2006-2007 in which priority objectives and actions were identified, focusing on the active inclusion of people with disabilities. This Communication is also the first EU report on the overall situation of persons with disabilities. One of the four priorities identified in this Communication is to increase the EU's analytical capacity. Development of reliable and comparable data will provide a better understanding of the evolving situation of disabled people and the interaction with other policy areas. In order to address the particular needs of people with disabilities the situation needs to be thoroughly mapped throughout the European Union - 25. In this respect the collection of administrative data on people with disabilities is essential to provide knowledge on the broad range of topics referring to the situation of disabled people.

3. *Subject of the contract*

The study would collect data on disabled persons obtained through ‘administrative registers’– including data from the new Member States - mainly from social security authorities, providing a validated picture of the situation of people with disabilities with respect to the following topics:

- prevalence of disability, by age, by sex, by degree and type of disability according to the International Classification of Functionalities (ICF) of the World Health Organisation framework (including mental/physical)
- origin of disability (from birth, accident, work accident etc.);
- education (in ordinary environment and in special education);
- employment (including sheltered employment), unemployment and inactivity (for the working age population);
- benefits received (reference document: Social Protection of people with disabilities, MISSOC-Info 1/2003);

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- accessibility to services
- long-term care.

As a result, the proposed study should:

- A. describe the situation of people with disabilities on the basis of administrative data for each of the twenty five Member States (i.e. understanding and interpretation of the national administrative data) as well as
- B. issue a summary report for each topic, which would in turn be used within the context of the Commission second biennial report on the overall situation of people with disabilities which is to be issued in December 2007.
- C. In addition, investigate the data quality and availability that could be used for indicators on the situation of disabled persons in education and Labour market.

This would be fully in line with the objectives of the EU High Level Group on Disability which is supporting exchanges on measurement.

Publications as a reference:

- Grammenos, S., 'Disabled Persons: Statistical Data', Eurostat, Theme 3: population and social conditions, Statistical Office of the European Communities, 1995
- Social protection of people with disabilities, MISSOC-Info 2003, DG EMPL,
- Definition of disability in Europe: A comparative analysis, A study prepared by Brunel University, DG EMPL 2002, *chapter 7*

4. Participation

Please note that:

The competition is open to any physical person or legal entity coming within the scope of the Treaties and any other physical person or legal entity from a third country which has concluded with the Communities a specific agreement in the area of public contracts, under the conditions provided for in that agreement.

Where the Multilateral Agreement on Public Contracts concluded within the framework of the WTO applies, the contracts are also open to nationals of States that have ratified this Agreement, under the conditions provided for therein. It should be noted that research and development services, which come under category 8 of Annex II A of Directive 2004/18/CE, are not covered by this Agreement.

In practice, the participation of applicants from third countries that have concluded a bilateral or multilateral agreement with the Communities in the area of public contracts must be allowed, under the conditions provided for in that agreement. Bids submitted by applicants from third countries that have not concluded such an agreement may be accepted, but may also be rejected.

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5. *Tasks to be carried out by the contractor*

5.1. *Description of the tasks to be performed by the contractor*

The contractor should be responsible for the following tasks, which should be undertaken in regular and close co-operation with the European Commission (DG EMPL. Unit G3 Integration of People with Disabilities and Eurostat Unit F5 Health and Food Safety Statistics):

The work programme will include the following elements:

- a) Identifying (potential) administrative sources for disability data in EU25 Member States and evaluation of the data quality, including with regards to gender related data;
- b) Data collection from the potential sources identified and evaluation of the data comparability at the EU level, including with regards to gender related data;
- c) Prepare a work plan for data analysis according to the data availability and which will take into account also the needs for the Commission biennial report on the overall situation of people with disabilities, including with regards to gender related data;
- d) Carrying out the data analysis in order to describe the situation of people with disabilities in EU25 Member States as indicated in point A, B and C on page 2, including with regards to gender related data;
- e) The drawing up of an intermediate report including methodological and structural part of work and the first results obtained by the analysis after the six months, including with regards to gender related data;
- f) The preparation of a final report, (minimum 30 pages) in paper form and in electronic form. The report should be submitted both in English and French.

In the offer the tenderer will have to indicate the methodology for both data collection and data analysis that he intends to implement.

In order to achieve these aims, an Expert Committee for the project should be set up by the contractor. The contractor should propose to the Commission the names of the members of the Expert Committee (experts and academics with relevant experience in the field, including experts from Member States). The Commission should give its agreement. The Expert Committee will be chaired by the Commission and will include the relevant Commission services. The contractor should ensure the "secretariat" and animation of the Expert Committee and include the related expenses in the budget.

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

The identification of potential administrative sources should mainly focus on disability data that can be used for arriving at a national estimate. In case a potential source turns out to be not feasible, the reasons why should be cautiously documented. For successful data sources, all relevant information such as the population coverage, confidentiality concerns, data quality, sustainability of the source etc. should be documented and evaluated.

On the basis of the results and conclusions from the previous task, a data collection should be carried out aiming to arrive at the best national estimate. Also, it should be evaluated if the selected sources provide comparable data across countries. The data to be collected should cover the following topics:

- prevalence of disability, by age, by sex, by degree and type of disability according to the International Classification of Functionalities (ICF) of the World Health Organisation framework (including mental/physical)
- origin of disability (from birth, accident, work accident etc.);
- education (in ordinary environment and in special education);
- employment (including sheltered employment), unemployment and inactivity (for the working age population);
- benefits received (reference document: Social Protection of people with disabilities, MISSOC-Info 1/2003);
- accessibility to services
- long-term care.

5.3. Deliverables

The deliverables of the study are:

A comprehensive report containing:

- A detailed analysis of the situation of people with disabilities on the basis of administrative data available in the Member States.
- A presentation of the data sources used for each country: coverage, sustainability, including evaluations of the data quality and cross-country comparability.

The European Community has the task to promote equality between women and men and shall aim in all its activities to eliminate gender inequalities (article 2 and article 3, par.2, of the EC Treaty). Therefore, tenders are requested to take into account gender equality at all stages of the work. This means examining measures and policies and taking into account such possible effects on the situation of women and men when defining and implementing these policies. Whenever possible, all data must be broken down by gender.

An executive summary of the results of the study targeted at the general public that could be incorporated into the second regular report of the Commission on the situation of people with disabilities.

6. Professional qualifications required

See Annex IV of the standard contract (CVs and classification of experts) and requirements referred under point 13 selection criteria. Any replacement of experts during the contracting period has to be presented to the Commission for agreement in advance.

7. Time schedule and reporting

In complement of the present Annex, please also see articles I.1., I.2. and I.4 of the Contract.

7.1. Time schedule

The duration of the tasks shall not exceed 12 month. The starting date will be the date on which the contract is signed by the last contracting party

7.2. Time schedule

Specific requirements other than those mentioned in Article I. 4 and II.4. (e.g. schedule of interim reports).

a) Interim report

The contractor will prepare an interim report in English, presented as follows:

- summary of the work carried out according to the present contract;
- work programme planned for the following period;
- any comments, suggestions and recommendations judged useful or necessary by the contractor
- The interim report should be delivered 5 month after the starting date on which the contract is signed by the last contracting party.

b) Final report

The Contractor will prepare in English a draft final report followed by a final report (see Article I.4 of the Contract), both presented as follows:

- Full description of the overall work carried out according to the present Contract;
- Presentation of the results obtained according to the present Contract for the whole period of performance;
- Technical comments on the content, presentation and value of the output realized and submitted for approval to the Commission;
- Any comments, suggestions and recommendations judged useful or necessary by the Contractor;
- The final version of the output document (final e report), as well as its summary.

The draft final version (plus two copies of it), must arrive at the Commission competent service no later than:

- Ninety days before the end of the performance period.

c) Additional requirements

All the reports described above will be submitted in English plus in electronic form. Rules in Annexes also apply to this contract

8. *Payments and standard contract*

In drawing up the bid, the tenderer should take account of the provisions of the standard contract which include the "General terms and conditions applicable to contracts". 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 of negligence on the part of the Contractor.

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

an advance payment of 20 % following the signature of the contract by both parties;
an interim payment of 40% after a request for payment by the contractor and after the interim report (see contract Article I.4,I.8 and II.4) has been accepted by the Commission;
a final payment to cover the balance due under the contract after the study report, the final (management) report and the final invoice are accepted.

8.1. *Pre-financing*

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

8.2. *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,

provided the report has been approved by the Commission.

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

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

8.3. *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,
- provided the report has been approved by the Commission.

The Commission shall have 45 days from receipt to approve or reject the report, and the Contractor shall have 30 days in which to submit additional information or a new report. Within 30 days of the date on which the report is approved by the Commission, payment of the balance of the total amount referred to in Article I.3.1 shall be made.

Performance guarantee

► Not applicable.

9. *Prices*

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

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

The contractor must take into account expenses for meetings with experts, with the Commission and with stakeholders, etc.

The maximum amount available for this contract is €400.000. Tenderers should note that any bids exceeding this limit will not be considered. The total price is Part A:

Part A: Professional fees and direct costs

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

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10. *Composition of a partnership or consortium*

If a partnership or consortium is envisaged, its composition should be specified, and the criteria listed under point 12 should be detailed for each individual member of the partnership. In addition, one of the consortium or partnership members must be designated lead contractor and will assume full responsibility towards the Commission as regards both this bid and the future contract, if awarded.

11. *Exclusion criteria and supporting documents*

Governed by

Article 93 of the Financial Regulations

1. Applicants or tenderers shall be excluded if:

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

Applicants or tenderers must certify that they are not in any of the situations listed in **paragraph 1 above**.

Article 134 of the Implementation Arrangements – Supporting documents

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

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

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

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

Article 94 of the Financial Regulations

2. 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 contract procedure or fail to supply this information.

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 bidders.

Any bid not including the supporting documents provided for in this Annex will be excluded.

A written self-declaration by the candidate that he is not in the situation described by article 93 § 1. a), b), d) and e) (see above) will not be accepted by DG Employment.

12. *Selection criteria*

Economic and financial capacity to carry out the study demonstrated as follows:

- the tenderer (or consortium) must provide proof of turnover in the last financial year at least equivalent to 100% of the proposed price of the contract;
- balance sheets from the last three financial years, where publication of the balance sheets is required under company law in the country in which the service provider is established; in the case of tenders from consortia, this certificate must be provided by each member of the consortium;
- a statement of the undertaking's overall turnover and its turnover in respect of the services to which the contract relates for the previous three financial years; in the case of tenders from consortia, this certificate must be provided by each member of the consortium;
- a bank declaration providing evidence of good financial standing; in the case of tenders from consortia, this declaration must be provided by each member of the consortium;

Technical and professional capacity for carrying out the project:

- A list of the main works carried out by the tenderer in relation to the subject of this call for tender over the past 3 years proving merits and experience in **academic and research activities in the area of statistics and disability**. In the case of tenders from consortia this list must be provided by each member of the consortium.
- Good experience in the specific field of the study (in particular on academic and research activities in the area of statistics and disability), as attested by the CVs and related documentation of experts proposed. The details of educational and professional qualifications of all the persons providing the services have to be included.
- Language skills sufficient to execute the tasks efficiently. The contractor or consortium should demonstrate solid linguistic capability covering at least the 3 working languages of the Commission (English, French, German) and should ensure that the project contains provision for interpretation and translation if this is considered necessary by the contractor.
- A list of co-ordinator(s) and experts proposed, together with their CVs and qualifications and professional capacities including linguistic capabilities.
- Proof of enrolment in one of the professional trade registers or a declaration or certificate, as prescribed in the legislation of the country in which the tenderer is located. In the case of tenders from consortia this proof must be provided by each member of the consortium.
- In the case of tenders from consortia: clear identification of the co-ordinator of the work who will also be responsible for signing the contract, and written confirmation from each member of the consortium that they would be ready and willing to participate in the work, and briefly describing their role.

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13. *Award criteria*

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

The level of understanding of the nature of the assignments, its context and the results to be achieved: (50%):

- Nature of assignment: The lead contractor should explain his conceptual approach for undertaking the study in accordance with the overall purpose and aim as set out in the tender specifications. (20%).
- Context and results to be achieved: The lead contractor should clearly define the required analysis, the issues to be addressed and the nature of the outcome to be achieved (30%).

The quality and appropriateness of the methodological approach proposed for the study. This will be assessed through the working methods and strategy proposed by the tenderer (50%):

- Methodology: The lead contractor should describe the way in which the analyses will be undertaken, i.e. the various steps envisaged, the documentary efforts undertaken, the collection of data necessary (30%)
- Strategy: The lead contractor should explain how the various parts of the analysis will be integrated into the conceptual approach (20%)

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

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

14. *Content and presentation of bids*

14.1. *Content of the 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 the 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. **Unsigned bids will be rejected.**
- They must be submitted in accordance with the specific requirements of the invitation to tender, within the deadlines laid down.