Specifications – Invitation to tender No VT/2011/008

WEESP - Webtool for Evaluated Employment Services Practices

1. TITLE OF THE CONTRACT

WEESP - Webtool for Evaluated Employment Services Practices

2. PROGRESS INTRODUCTION

PROGRESS¹ 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 Agenda², as well as to the objectives of the Europe 2020 Strategy. This new strategy, which has a strong social dimension, aims at turning the EU into a smart, sustainable and inclusive economy delivering high levels of employment, productivity and social cohesion. The European Union needs coherent and complementary contributions from different policy strands, methods and instruments, including the PROGRESS programme, to support the Member States in delivering on the Europe 2020's goals.

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 is 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).

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.

The present call for tenders is issued in the context of the implementation of the 2011 annual work plan which can be consulted at http://ec.europa.eu/social/main.jsp?catld=658&langld=fr

3. BACKGROUND

As part of the Europe 2020 Strategy for smart, sustainable and inclusive growth "An Ag Europe 2020 is the EU's growth strategy to develop a smart, sustainable and inclusive economy delivering high levels of employment, productivity and social cohesion. It has five ambitious headline targets - on employment, innovation, education, social inclusion and climate/energy - to be reached by 2020. To support the achievement of these targets the Commission presented seven flagship initiatives. 'An Agenda for New Skills and Jobs' is the key flagship initiative to help the EU reaching the objective of an employment rate of 75% for women and men aged 20-64 by 2020.⁴.

This flagship initiative sets out 13 key actions with accompanying and preparatory measures in support of four key priorities:

- making Europe's labour markets function better by strengthening flexicurity;
- equipping people with the right skills for employment;
- improving job quality and working conditions; and
- Supporting job creation.

Regarding flexicurity, the Agenda initiates 'a new momentum for flexicurity' to further modernise labour markets, revisiting and adapting flexicurity policies to post-crisis context by strengtening the flexicurity components and implementation. The objective of this revision are to accelerate the pace of reform, reduce labour market segmentation, support gender equality and make transitions pay.

Ultimately, the main responsibility and instruments to achieve Europe2020 objectives rest with the Member States, in conformity with the Treaty and the subsidiarity principle. The Employment Guidelines⁵ emphasize the need for Member States to integrate the EU common principles of flexicurity⁶, enhance flexibility and security of their labour markets and implement active labour market policies as well as effective lifelong learning measures to address current and future demands in the labour market.

³ COM(2010)682 final of 23.11.2010

⁴ Two other initiatives complement the "Agenda for new skills and jobs" flagship: 1. the 'New Skills for New Jobs' initiative launched in 2008 which sets out the Commission's agenda for better skills upgrading, anticipation and matching and will support the skills priority of the flagship; 2. the "Youth on the Move" flagship initiative which aims to help young people to gain the knowledge, skills and experience they need to make their first job a reality.

⁵ COM(2010)193 final of 27.04.2010

⁶ Communication COM(2007) 359 final of 27/06/2007 "Towards Common Principles of Flexicurity" http://ec.europa.eu/social/main.jsp?catId=118&langId=en

The European Employment Strategy (EES) puts specific focus on increasing the scale and levels of overall labour mobility and considers it essential for workers to take advantage of more job opportunities and for companies to adapt to the dynamics of the economy. Within the EES, public employment services (PES) are in charge of translating employment policy orientations into actions by implementing key initiatives at the level closest to the citizen. They are therefore responsible for the delivery of core parts of the EES and corresponding national employment policies, such as flexicurity approach⁷ and the New Skills for New Jobs initiative⁸ which now underlines the EES.

One crucial lesson learnt from the evaluations of the Lisbon strategy is the importance of a proper implementation of the strategy. Employment services and in particular Public Employment Services (PES) play an important role in the implementation; it is therefore essential to strengthen their implementation capacity and to further improve their service delivery. While their main role currently is to address the needs of the unemployed, employment services can play a more comprehensive role as lifelong career service providers, delivering on several fronts: skills assessment, profiling, training advise and/or direct delivery, individual career guidance and client counselling (both to workers and employers), matching people to adequate job profiles, and offering services to an increasingly diversified client base, as well as catering for the challenges of those furthest away from the labour market. Employment services should also engage in partnerships among themselves (public, private and third sector employment services) whenever economies of scale and efficiency gains can be obtained. Equally crucial will be encouraging stronger ties between employment services, education and training providers, social partners, NGOs and other institutions.

Employment Guideline 7 relates to increasing labour market participation and reducing structural unemployment. It specifically refers to employment services as their interventions are crucial for a better functioning of labour markets in the future when it comes to matching effectively jobseekers and vacancies. : "Employment services should be strengthened and open to all, including young people and those threatened by unemployment with personalised services targeting those furthest away from the labour market. ⁹

Employment Guideline 8 relates to the development of a skilled workforce responding to labour market needs and promoting lifelong learning, employment service can make a real difference when it comes to skills strategies for matching current and future demands in labour markets, bringing labour market reality closer to the education and vocational training policy designers and service providers through preventive approaches, provision/prescription of training and skills development.

web site: http://ec.europa.eu/social/main.jsp?catId=568&langId=en

⁷ Communication COM(2007) 359 final of 27/06/2007 "Towards Common Principles of Flexicurity" http://ec.europa.eu/social/main.jsp?catId=118&langId=en

⁸ COM (2008) 868 final: New skills for new Jobs initiative aims at improving the capacity to anticipate and match labour market and skills needs in the EU and at promoting a European labour market for jobs and training that corresponds to citizens' mobility needs and aspirations.

 $^{^9}$ Council Decision 2010/707/EU of 21 October 2010 on guidelines for employment policies of the member States, OJ L 308 of 24.11.2010 p. 49.

Employment services – public, private and third sector - are thus at the forefront for better delivery of the EES. Consequently, employment services will be more than ever expected to provide operational feedback on what type of returns labour market investments bring so as to well inform those in charge of policy design. Employment services are able to provide this information and must also be able to access the information generated by another employment service. The purpose of this call is to respond to the need of employment services to be able to access information on what already works and what does not work elsewhere.

To facilitate the access to such information, the European Commission is setting up a repository of evaluated Active Labour Market Policy Measures, tools, practices and services delivered by all kind of employment services in order to better understand and identify which practices work, in what context and why, which is the subject of this call for tenders¹⁰. Moreover, given the current crisis context and the budgetary constraints of the Member States, there is the need to develop such an information system to allow Member States to take informed decision in a swift manner when it comes to the implementation and design of labour market policies.

This new repository of evaluated employment services practices is part of a wider strategic integrated initiative of the Commission that encourages an EU-level strategic dialogue between Employment Services: Partnership between employment services – PARES.

The end to the monopoly in the delivery of employment services has led to the emergence of a huge number and variety of service providers on the European labour markets. Apart from the traditional player, the public employment services, there are also private and third sector employment services, municipalities, universities as well as voluntary and community organisations providing a broad range of client services. The relations between these employment services are characterised very often by cooperation in various forms, as well by complementarity of services but also by a strong competition in some areas (for example in case of tendering procedures and contracting out).

All these players are regarded as key in contributing to reach the objectives as defined in the EU2020 strategy (which sets out a vision to achieve high levels of employment, productivity and social cohesion and a low carbon economy), to be implemented through concrete actions at EU and national level. In times of serious budgetary constraints and high unemployment the focus of the three PARES activities is on increasing the efficiency of publicly funded employment services delivered by public or private employment services and at the same time on high-quality service provision for different groups of clients. Well-structured partnerships between private and public providers combine the advantages of market forces with public social policy goals and can help reach the EU2020 objectives.

¹⁰ Communication COM(2010)682 final of 23 November 2010 "An Agenda for new skills and jobs: A European contribution towards full employment", page 8: "a new web tool will disseminate the evaluated and tested good practices". http://ec.europa.eu/social/BlobServlet?docId=6328&langId=en

PARES will bring together all employment services with the aim of improving the cooperation between them and to further define the fields in which they deliver services in complementarity. Recently some Member States of the EU have started to further liberalise the provision of services to jobseekers and have extended the role of private actors in the delivery of public employment assistance programmes. PARES does not aim to further increase the competitive pressure among employment services. In fact it should focus on how the cooperation can be further improved and how the complementarity of their service offers can be further developed. By this the EU added value of PARES will be demonstrated. PARES does not aim at changing/revising the regulatory framework for the provision of employment services

PARES is an important accompanying measure in the Commission's flagship initiative "An agenda for new skills and jobs" to support flexicurity. It consists of three mutually reinforcing different strands:

- 1. The PARES Strategic Dialogue will provide a forum for exchanging and further conceptualizing good practices of co-operation and complementary service provision between employment services, and for jointly developing schemes for policy implementation and feedback to policy designers in order to support the EU2020 employment targets. A PARES launching conference will take place in autumn 2011, followed by more restricted set of dialogue events and a final dissemination event in 2012.
- 2. The PARES call for proposals directed at projects introduced by employment services that showcase the mixed provision of employment services for vulnerable groups. Main feature of the proposals should be to either have this element of mixed provision of services by different types of employment services and/or a funding scheme for the mixed provision that is purely outcome-based meaning that service providers are only remunerated in case of success.
- 3. WEESP, the Webtool for Evaluated Employment Services Practices. It will include organisational practices, tools and ALMP measures Pre-condition for inclusion into the on-line repository will be an evidence-based internal and/or external evaluation or systematic monitoring of the results of the measures, tools, practices and services. This is to take the form of an on-line repository located on DG EMPL website that will list and disseminate the evaluated and monitored Employment Services measures, tools, practices and services. Employment Services of all types, participating in the PARES initiative or not will be invited to contribute with descriptions of their evaluated or monitored measures, tools, practices and services to WEESP. The content of this on-line repository will be different from Eurostat's database of Labour Market Policies (LMP)¹¹. The Eurostat LMP database was developed as an instrument to monitor the implementation and evolution of targeted labour market policies. The LMP database covers public interventions which are explicitly targeted at groups of persons with difficulties in the labour market: its focus is on categorisation of interventions into services, measures and supports and on collection of data on expenditure and participants related to each intervention. The quantitative data on expenditure and participants are complemented by a set of qualitative reports which describe each intervention, how it works, the main target groups, etc. These qualitative reports of the LMP database can provide a

¹¹ For details see http://epp.eurostat.ec.europa.eu/portal/page/portal/labour market/labour market policy

useful input for the development of WEESP. Furthermore, the WEESP should indicate the link to the LMP database, i.e. where relevant it should include information for evaluated services and ALMP measures if they are included in the LMP database. The qualitative reports developed by Eurostat's LMP database are descriptions of a broad set of publicly funded labour market policy interventions and follow an agreed structure. The country contributions give a good overview of the basic structure of labour market policies.

WEESP, on the other hand, is a learning tool and is different from Eurostat's LMP database in the following three aspects: It has a different content focus, because only evaluated (or monitored) measures will be selected. Such information is not included into the LMP qualitative country reports. Secondly, the perspective is different, as the WEESP aims to provide information from all employment services to employment services (and other interested labour market actors) including information from private employment services, municipal services, non-for profit organisations to complete the picture. Thirdly, WEESP will have a different structure and form of presentation, following mainly an issue-oriented approach developing an on-line repository for an easily accessible presentation.

Data collected for Eurostat's LMP database which are not published but can be useful for WEESP can be made available to the contractor.

Under PARES, all Employment Services should be invited and encouraged to share practices that have been evaluated and/or assessed either by internal and/or external evidenced-based evaluation or monitored in-house with a sound methodology. WEESP will focus on the often smaller and innovative/creative tools, practices and LMP measures by which employment services implement bigger programmes. The main objective of WEESP will be to make this information public in a systematic and easily accessible manner for policy makers and practitioners.

A first edition of WEESP should be available at the **PARES dissemination conference** in **2012.** The financing of WEESP will come from the employment section of PROGRESS

4. Subject of the contract: Purpose

The decision n°1672/2006 establishing a "Community programme for employment and social solidarity – PROGRESS", under article 4, sets out that section one of the programme shall support the implementation of the European Employment Strategy (EES), and promote it by organising exchanges on policies, good practice and innovative approaches, and promoting mutual learning in the context of the EES. On another hand, in the same decision, art.9 (1) b) describes the types of actions covered by the mutual learning activities. WEESP will be a tool for bringing together and exchanging experiences in the Member States, disseminating information and promoting the debate (art 4 §1)d).

The purpose of the call for tender is to find a contractor to assist the Commission in the implementation of a repository of evaluated or monitored practices or practices with some evidence of assessment of results carried out by employment services. This information will be made public to support mutual learning and to give info to policy makers. Available budget:

The contract is foreseen for a period of 18 months and renewable once.

5. 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.

6. TASKS TO BE CARRIED OUT BY THE CONTRACTOR

The contract will consist of the following tasks:

Task 1: Collection of evidence from various sources at national level

a) Research

The contractor will be responsible for gathering examples of evaluated or systematically monitored practices in the business areas of employment services. For the purposes of this call, the following definitions apply:

- Employment services: all kinds of employment services: public, private, local, municipal, social and NGOs.
- Evaluated or systematically monitored practices: interventions, services, tools, projects, etc, developed and operated by employment services. These practices must have been evaluated either internally or by external evaluations or, if not, they must have been systematically monitored with clear measurement and indication of results. For the purpose of this call for tender, a "practice" means all measures, tools or services by which employment services are running their business. The envisaged range covers organisational practices, monitoring and steering systems, IT solutions as well as all kind of measures for inactive, jobseekers, job changers and employers in the areas of profiling, early intervention, training, career guidance, matching, employment incentives, supported employment and rehabilitation, job creation, start-up incentives, etc (this list is purely indicative)

• For the purpose of this call for tender evaluated or systematically monitored means that the evaluation undergone by the practices can be external, internal or with a monitoring system that allows for a reliable objective measurement of the performance.

The contractor will have to provide descriptions of evaluated practices carried out by employment services, irrespective of the source of financing¹². Practices can also be found in the mutual learning activities under the European Employment Strategy and the Social OMC¹³. The contractor will have to propose the most important data to be collected. The number of data to be collected has to be proposed by the contractor, bearing in mind that the repository must be practical and of easy use. The contractor will also propose what metadata¹⁴ could be useful in this context. To do so the contractor will have access to Employment Services, which might be asked to provide the contractor with information about their activities All selected practices should be presented in a common template, to be proposed by the contractor as well, providing an executive summary in English, French and German followed by a link to relevant web pages (all EU languages acceptable). The template and all the content will have to be optimised not only for the internal search but also for external search engines.

The starting date for the collection of these practices could be the years 1998, year of the launch of the European Employment Strategy. Older practices might be included if they prove to be effective and efficient, still in place or still relevant in the current economical context. In selecting practices, preferential attention must be given by the contractor to those which have proven significantly effective and efficient in tackling long-term unemployment, addressing vulnerable target groups, scoring a higher level of customer satisfaction or of integration rate, thus reflecting the priorities of the European Employment Strategy. Furthermore, the contractor will conduct its research and gathering activity bearing in mind the importance of "transferability" of practices, i.e. the extent to which the effectiveness and efficiency of the relevant good practice depend on systemic conditions (and therefore the feasibility of its application in a different system).

The tenderers must also explain how they will verify the information provided by their contact experts or subcontractors, if any, and how they will ensure a thorough quality check of the database. This applies mainly for the practices that have not been evaluated externally but is not limited to them. The contractor's task in this context goes further than just carrying out a plausibility check.

b) Countries covered

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A useful starting point for ESF projects is to be found here: http://ec.europa.eu/esf/main.jsp?catId=46&langId=en

¹³ See for example peer reviews on active inclusion of vulnerable groups: http://www.peer-review-social-inclusion.eu/key-themes/promoting-active-inclusion-1 and peer reviews in the field of employment on http://www.mutual-learning-employment.net/

¹⁴ For the purpose of this call for tender, metadata is defined as data providing information about one or more aspects of the data, such as: means of creation of the data, purpose of the data, standards used.

The database will cover the 27 EU Member States as well as the EFTA/EEA countries. By the end of the contract, practices involving all 27 Member States as well as the EEA/EFTA countries must be present in the database. The geographical coverage of the good practices is explained in section 6.2.

c) Standard file in EN-FR-DE

These examples of practices must be summarised in three languages: English, French and German. A standardised information file providing an executive summary of the practice will be developed in cooperation with the European Commission. This should be no more than 1500 words in length and include the most important details characters summarising the practice in an understandable fashion, with a specific reference to the value of "transferability" as described above. The text must be easy to understand and well structured for reading online. These executive summaries will be accessible via the repository interface on DG EMPL website and constitute the main entry point to the original practice which should always be provided, wherever possible via the appropriate direct web reference. The translations must be of professional standard and will be carried out by the contractor.

Task 2: Uploading and updates of the repository

Technical developments and maintenance will be done by DG EMPL. The contractor will have to upload the content – insert data – in close cooperation with DG EMPL. WEESP must also be updated regularly. It does not need to be updated at the same moment of the year. However, there is the need to provide reliable information that stakeholders are able to access and that is frequently reviewed. The update of the repository's content will enable it to have both longitudinal information (observation of the same items over a long period of time) and new development in the areas of service delivery of employment services. The contractor, with the agreement of DG EMPL, should propose the best way to update the repository's content, be it using automated solutions at regular intervals (for example every three, six, nine months) or on the basis of the needs (for example whenever a new good practice is found,), taking into account the technical constraints of DG EMPL website.

Task 3: Updating the users

The repository will offer interested parties the possibility to receive information about all new entries in the database. Information provided must be in English, French and German. These alert messages will be prepared by the contractor in English, French and German and should be based on, and linked to, new information available in the repository. The details for the delivery of this service will however depend on the way the update of the repository will be guaranteed.

Task 4: Prepare an ad-hoc report

The contractor should draft and submit to the Commission a report, presenting analysis and summary of trends and comparison of results between countries and possibly the state of the art of employment services practices in the countries listed in the database. This ad-hoc report is part of the contract and may be requested by the Commission at any moment of the contract duration and should then be delivered within 4 weeks. The contractor will ensure that the report is not a repetition of the repository, as it will be

focusing on identifying and analysing common trends among the countries present in the database, thus bringing a specific added value to the project. The subject of such a report will be agreed with the Commission on a yearly basis, and could predictably vary from a specific analysis of target group based actions (such as interventions for vulnerable groups) to more "horizontal" i.e. generic issues such as tools for policy delivery. The report should total about 30 pages, including tables and graphs. It must be written in English and contain an executive summary of around 2 pages in English, French and German. Translations must be checked by professional translators. The report may be published under the responsibility of the Commission, on line and possibly on paper. It should be sent to the Commission in electronic format as MS Word document (*.doc).

Task 5: specific requests

The tenderers should take into account in their offers that they might be required, if necessary, to answer to specific questions from the European Commission, related to the website, the data, the methodology, etc, through ad–hoc small-scale requests. This might happen in case of parliamentary questions or requests from Member States. The contractor might also be asked to prepare presentations (PowerPoint or others) which will be delivered by the Commission. The working language of these ad-hoc requests could be English or French. Budgetary provisions should therefore be earmarked.

Task 6: Steering committee

In executing the contract, the contractor will work closely with the Directorate-General for Employment, Social Affairs and Inclusion and under its instructions. This includes close cooperation with a steering group composed of European Commission representatives and other persons as nominated by the Commission. The purpose of these meetings is to monitor the project implementation and to advice on, if necessary, corrective measures. The contractor should to that end, foresee the need for 4 or 5 meetings per year, including oral presentations if needed with the Commission in its Brussels premises (these meetings will be organised back-to-back with the meetings described in point 8 (2)). The working language of the meetings will be English.

Task 7: Work programme

The tenderers are invited to include in their offer a preliminary programme of the work to be done in the contractual period.

Task 8: Quality control

The tenderers should propose a quality control procedure.

6.1 Guide and details on how the tasks are to 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 proposed activities includes a perspective informed by a systematic consideration of the gender dimension;

- Performance monitoring includes the collection and gathering of data disaggregated by sex when needed;
- Its proposed team and/or staff respects the gender balance at all levels.

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

6.2 Geographical coverage

The webtool of evaluated practices (WEESP) covers the 27 EU Member States as well as the EEA/EFTA countries. Should, during the contract period, other countries participate in the PROGRESS programme as member States, the coverage of the contract may be amended in accordance with art. 126 1.f of the implementation rules of the Financial Regulation (negotiated procedure). Unless otherwise stated, the term "Member States" used below accounts for all participating countries under the geographical coverage.

7. PROFESSIONAL QUALIFICATIONS REQUIRED

See Annex IV of the draft contract, CVs and classification of analysts.

8. TIME SCHEDULE AND REPORTING

See Article I.2. and 1.4 of the draft contract.

The full duration of the contract should not exceed 18 months from the date of the signature of the contract. The contract may be renewed once. Please note that the time schedule described below refers to a 18-month period; all the documents and deadlines referred to hereinafter will have to be submitted on a yearly basis.

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

(1) The **specific deadlines for the completion of each of the tasks** set out at point 6 (Tasks to be carried out by the contractor) will be agreed between the Commission and the Contractor and approved by the Commission on the basis of the proposal of the Contractor.

The contractors are asked to provide the following:

An inception report in English. This should detail the approach, organisation, methodology of the work and work plan. It should include the calendar of the tasks and a detailed description of how the team will

organise and manage the different tasks and events under WEESP. This is due two months after signature of the contract.

An interim report in English. This should provide a detailed description of the tasks performed so far and short term follow-up of each point mentioned. This is due at the end of month 9 of the contract. It will include a complete overview of all activities undertaken under WEESP so far.

- A draft final procedural report in English.

It should contain a list of the tasks performed after 18 months and a brief description of those tasks. It will be the product of all activities undertaken and will be subject to the agreement by the Commission. It will not exceed 100 pages. This is due at the end of month 17.

The **final report** in English. This report will take into account the observations and comments of the Commission. It will not exceed 100 pages and will be accompanied by an executive summary of max. 10 pages. All reports described above will be submitted in English language, in 3 hard copies delivered to the European Commission in Brussels as well as in electronic format (.doc). This is due at the expiration of the contract (18 months).

(2) The contractor should foresee 4 or 5 working meetings with the Commission Services, to take place in Brussels approximately in correspondence to the delivery dates of reports. Budgetary provisions should thus be earmarked (see also Task 6)

(3) 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's 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 precandidate 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.

(4) Reporting requirements under PROGRESS

PROGRESS is implemented through a results-based management (RBM). The Strategic Framework, developed in collaboration with the Member States, social partners 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. 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/service order/. 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.

9. PAYMENTS AND STANDARD CONTRACT

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

Payments will be made at intervals throughout the contract period as function of the progress made, the reports submitted and the quality of the work undertaken.

• Pre-financing

Following signature of the Contract by the last contracting party, within 30 days of the receipt by the Commission of a duly constituted financial guarantee equal to at least the invoiced pre-financing amount, a pre-financing payment equal to 30% of the total amount referred to in Article I.3.1 of the contract shall be made.

• Interim payment

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

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

The Commission shall have 60 days from receipt to approve or reject the report, and the Contractor shall have 30 days to submit additional information or a new report.

Within 30 days from the Commission approval of the interim report an interim payment corresponding to the relevant invoices, up to maximum 40% of the total amount referred to in Article I.3.1 of the contract, shall be made.

• Payment of the balance

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

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

The Commission shall have 60 days from receipt to approve or reject the report, and the Contractor shall have 30 days to submit additional information or a new report. Within 30 days from the approval date of the report the Commission, payment of the balance of the total amount referred to in Article I.3.1 of the contract shall be made.

10. PRICES

The total price of the offer will not exceed € 700 000 (seven hundred thousand Euros) per 18 months. Bidders should note that any bid exceeding this limit will not be considered.

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 issue day of the invitation to tender), and broken down according to the model in Annex III included in the attached standard contract.

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.

• 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 analyst and member of the contractor's team proposed. The unit price should cover the fees and administrative expenditure, but not the reimbursable expenses referred to below.
- Other direct costs (please specify in detail)
 - o Any translation expenses.
 - o Any other direct costs
 - o Costs for Website (to be checked with Directorate G).

• Part B: Reimbursable expenses

- Travel expenses (other than local transportation costs) and subsistence expenses of the Contractor and his staff (covering the expenditure incurred by analysts on trips outside their normal place of work) relating to meetings between the contractor and the European Commission during the contract period upon request of the European Commission.
 - Expenses for the shipment of equipment or unaccompanied luggage directly connected with performance of the tasks specified in Article I.1 of the contract contingencies.

Total price = Part A + Part B= 700.000 € maximum

11. 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. Nevertheless it is necessary to specify that 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 contract¹⁵. However, a grouping of economic operators must nominate one party to be responsible for the receipt and processing of payments for its members, for managing the service administration, and for coordination. The documents required and listed in the following points 12 and 13 must be supplied by every member of the grouping.

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

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.

12. EXCLUSION CRITERIA AND SUPPORTING DOCUMENTS

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

Those articles are as follows:

Article 93:

Applicants or tenderers shall be excluded if:

- (a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- (b) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of res judicata;
- (c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- (d) they have not fulfilled their obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- (e) they have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
- (f) they are currently subject to an administrative penalty referred to in Article 96(1)16.

Article 94:

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

(...)"

¹⁶ "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.

- (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 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.

13. SELECTION CRITERIA

The candidates will be selected on the basis of their financial and economic capacity and their professional and technical capacity.

a) Economic and financial capacity:

Tenderers must provide sufficient information to satisfy the Commission of their financial standing and more particularly that they have the necessary resources and financial means to carry out the work that is the subject of the tender and that the tenderer is viable for the duration of the contract.

The following three documents should be provided:

- A bank declaration providing evidence of sound financial standing. In the case of tenders from groupings or consortia, this certificate must be provided by each member of the grouping or consortium.
- A statement that the tenderer's average overall turnover is at least 100% of the value of this contract (700 000 €) in the last two financial years. In the case of tenders from consortia the overall turnover of the consortium has to be taken into account;
- Accounts balance sheets and profit and loss accounts for the last two financial years, where publication of the balance sheets is required under company law in the country in which the service provider is established, certified by an external audit if required by national law. In the case of tenders from groupings or consortia, this certificate must be provided by each member of the consortium.
- 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/she may prove his/her economic and financial capacity by any other means which the contracting authority considers appropriate.

b) Technical and professional capacity:

For the **contractor**:

- Proven experience to set up and manage a solid international team capable of delivering the tasks mentioned in point 6;
- Proven experience to manage the administrative, financial and IT aspects of the contract;
- Proven capacity to set up the appropriate organisational structure to carry out all the tasks involved and described in point 6.

For the **co-ordinator** of the contract, this will require:

• Proven experience to perform the coordination and the administrative tasks involved in organising and managing a team capable of delivering

the tasks mentioned above, in particular the ability to call on the necessary expertise carry out the tasks described in point 6. Proven experience of working in an international context, in-depth knowledge of EU employment and social policies, with specific issues related to the functioning of labour markets, of PE, of other employment services and current EU priorities, acquaintance with EU stakeholders involved in employment and social policies, ability to manage a team of international experts and good analytical and drafting capacity. This experience must be demonstrated by having at least a 10-year experience in one or more of the following fields: labour market institutions, employment services responsibilities and activities, labour mobility, labour economics, and labour market analysis/policies;

- Strong planning and organisational skills; This must be demonstrated by having at least a 5 year experience in the coordination of projects irrespective of the source of financing and use of appropriate project management methodologies.
- Strong analytical capacities, ability to make oral presentations, facilitate
 meetings and excellent speaking and drafting capabilities. These skills
 must be demonstrated by highlighting in the CV the relevant roles that the
 coordinator has performed. The Commission expects that the coordinator
 has fulfilled these roles for at least five years.
- Proven capacity to liaise with all the relevant actors and strong acquaintance with EU stakeholders involved in employment and social policies. This capacity must be demonstrated by highlighting in the CV the relevant roles and the stakeholders with which the coordinator has interacted. The Commission expects that the coordinator has fulfilled thisroles for at least five years.
- Excellent command of the English language and knowledge of other EU languages; communication with the Commission will be done in English;

Members in the contractor's team who are in charge of the tasks under section 6 will have to fulfil the following requirements:

- Their availability to perform analysis on employment services issues with
 a strong national labour market background. The experts should have at
 least five years of European and/or international level research experience
 after having completed university education. These skills have to be
 attested by the CVs and related documentation of the analysts and experts
 proposed.
- More than 50% of members of the contractor's team shall have at least a 10-year professional experience in one or more of the following fields: labour market institutions, PES' and other employment services responsibilities and activities, labour mobility, labour economics, evaluation/performance measurement, development of international databanks/information systems in the field of employment policies and labour market analysis or policies;

- Members of the team must have excellent combined drafting skills in English, French, German, Italian and Spanish to prepare the files to be published in the repository. These skills must be highlighted in the CVs.
- Members of the team dealing with the on-line repository must have at least 5 years experience in managing databases and websites.

Means of proof required Technical and professional capacity of the tenderer shall be evaluated and verified on the basis of the following:

For the **contractor**:

- List of projects carried out in the last five years, irrespective of the source of financing (public, private).
- List of projects in fields similar to this call for tender (web sites, databases and employment policies).

For both lists above, the following information must be indicated clearly:

- amount per project,
- source,
- total amount of all the projects/contracts,
- number of persons involved in the contract,
- purpose of the contract.

For the **co-ordinator**:

• His/her CV, clearly indicating qualifications, language skills and list of projects managed as well as publications, if any;

For the **members of the contractor's team**:

• His/her CV, clearly indicating qualifications, language skills and list of projects managed as well as publications, if any.

* * *

• A declaration by the co-ordinator certifying that the language skills of the team are sufficient to execute the tasks efficiently. The contractor or consortium should demonstrate solid linguistic capability covering at least the English, French, German, Italian and Spanish) and should ensure that the project contains provision for interpretation and translation if this is considered necessary by the contractor

Tenderers not meeting the abovementioned requirements on economic, financial and technical capacity will be excluded from further assessment of their bids.

14. AWARD CRITERIA

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

(i) Quality of the proposal

30%

- Overall understanding of the nature of the project and the context;
- Understanding of the results to be achieved.
- Coherence of the activities proposed with the results to be achieved.

(ii) Work organisation

40%

- Clarity and coherence of the work plan;
- Clear description of the ways to achieve each of the results to be obtained with the resources needed,
- Good, clear, efficient and result-oriented organisation of the work distribution of staff;
- Timetable: good organisation in time of the performance of the tasks required;

(iii) Methodological approach

30%

- Effectiveness of the methodological approach to develop the various activities of the tender including methodological approach to co-operate with employment services delivering information on practices;
- Methods to process, analyse, cluster and organise information
- Completeness of the methodology of dissemination and publication of outputs.

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

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

15. CONTENT AND PRESENTATION OF BIDS

Content of bids

Tenders must include:

- all information and documents necessary for the Commission to appraise the bid on the basis of the selection and award criteria (see points 13 and 14 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.

Tenders must be presented in three parts:

- Part I: containing all administrative information
- Part II: containing the technical content of the bid
- Part III: containing the financial part of the bid.

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

They must be clear and concise.

They must be signed by the legal representative.

They must be submitted in one of the official languages of the European Union.

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

Regarding the presentation of the bid, it is compulsory to:

- Print the documents double-sided;
- Use only 2-hole folders, **no binding or glue, please!**
- Annex I Articles 93 & 94 of the Financial Regulation (see point 12 Exclusion Criteria)
- **Annex II** Overview of Progress Performance Measurement Framework

Annex I of the Tender Specifications

Exclusion criteria	Supporting documents to be provided by applicants, tenderers or tenderers to who the contract will be awarded		
(Article 93(1) FR)	Procurement (Article 93(2) FR; Article 134 IR)		
1. Exclusion from a procurement procedure, Article 93(1) FR: « Candidates or tenderers shall be excluded from participation in a procurement procedure if:			
1.1. (subparagraph 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 ¹ ;	administrative authority in the country of origin or provenance or 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		
1.2. (subparagraph b) they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata ² ;	Cf. supporting documents for Article 93(1)(a) FR above		

⁻

See also Article 134(4) 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 3 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.

² Cf. footnote n° 1.

Exclusion criteria	Supporting documents to be provided by applicants, tenderers or tenderers to who the contract will be awarded		
(Article 93(1) FR)	Procurement (Article 93(2) FR; Article 134 IR)		
1.3. (subparagraph c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;	Declaration by the candidate or tenderer that he is not in the situation described		
1.4. (subparagraph d) 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 ³ ;	Recent certificate issued by the competent authority of the State concerned confirming that the candidate is not in the situation described Or 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		
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 ⁴ ;	Cf. supporting documents for Article 93(1)(a) FR above		
1.6. (subparagraph f) they are currently subject to an administrative penalty referred to in Article 96(1) ⁵ . »	Declaration by the candidate or tenderer that he is not in the situation described		

³ Cf. footnote n°1.

⁴ Cf. footnote n° 1.

⁵ Article 96(1) FR: The contracting authority may impose administrative or financial penalties on the following:

Exclusion criteria	Supporting documents to be provided by applicants tenderers or tenderers to who the contract will be awarded		
(Article 94 FR)	Procurement	Grants	
2. Exclusion from a procurement or grant award procedure Article 94 FR: « Contracts may not be awarded to candidates or tenderers who, during the procurement procedure:			
2.1. (subparagraph a)			-
are subject to a conflict of interest;	Statement by the applicant, tenderer or bidder confirming the absence of conflict of interests, to be submitted with the application, bid or proposal		
2.2. (subparagraph 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» ⁶ .	 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 complete⁷ and to identify any misrepresentation 		_

⁽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.

⁶ 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 a specified time-limit. » 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. »

⁷ Cf. footnote n°1

Annex II of the Tender Specifications

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 toward 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 toward Social Agenda objectives.

In operational terms, support provided by PROGRESS facilitates (f) 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.

Legal Regime

Outcome:

Compliance in Member States with EU law related to PROGRESS areas.

Performance Indicators

- Transposition rate of EU law on matters related to PROGRESS policy areas
- 2. Effectiveness of application in Member States of EU law on matters related to PROGRESS policy areas.
- 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
- 4. Extent to which PROGRESS-supported policy advice feeds into the development and implementation of EU legislation and policies
- 5. Cross-cutting issues are addressed in PROGRESS
- policy sections
 6. EU policies and legislation display a common underlying logic of intervention in relation to PROGRESS
- 7. Gender mainstreaming is systematically promoted in PROGRESS

Shared Understanding

Outcome

Shared understanding and ownership among policy/decision-makers and stakeholders in Member States, and the Commission, of objectives related to PROGRESS policy areas.

Performance Indicators

- 1. Attitudes of decision-makers, key stakeholders and general public regarding EU objectives in PROGRESS
- policy areas

 2. Extent to which national policy discourses or priorities reflect EU objectives
- 3. Extent to which principles of good governance (including minimum standards on consultation) are respected in policy debate
- 4. Extent to which the outcomes of policy debates feed into the development of EU law and policy.
- 5. Greater awareness of policy-and decision-makers, social partners, NGOs, networks regarding their rights/obligations s in relation to PROGRESS policy
- 6. Greater awareness of policy-and decision-makers, social partners, NGOs, networks regarding EU objectives and policies in relation to PROGRESS policy areas

Strong Par nerships

Outcome:

Effective partnerships with national and pan-European stakeholders in support of outcomes related to PROGRESS policy areas.

Performance Indicators

- Existence of common ground/consensus among policy and decision-makers and stakeholders on EU objectives and policies
- 2. Identification and involvement by the EU of key actors in a position to exert influence or change at EU and national levels
- Effectiveness of partnerships in relation to outcomes related to PROGRESS policy areas.
- 4. Number of individuals served or reached by networks supported by PROGRESS.
- 5. Extent to which advocacy skills of PROGRESSsupported networks have improved
- 6. Satisfaction of EU and national authorities with the contribution of networks
- 7. Extent to which PROGRESS-supported networks take a cross-cutting approach