
Specifications – Invitation to tender No VT/2007/10

Service contract for the establishment and maintenance of a network of experts in gender equality, social inclusion, health and long-term care

1. Title of the contract

Service contract for the establishment and maintenance of a network of experts in gender equality, social inclusion, health and long-term care (VC/2007/0002)

2. Background

Equality between women and men is a founding principle of the Treaty of the European Union. Despite progress made in the last decades, gender inequalities are still persistent in a number of domains.

Poverty is increasingly feminized and affects especially single mothers and elderly women. Gender inequalities however are also persistent in other groups facing social exclusion, for example among immigrants, ethnic minorities and the disabled. This means that there are differences in the causes, extent, and form of social exclusion experienced by women and men.

Since 2000 one of the goals of the open method of coordination (OMC) for social inclusion¹ has been to eliminate these inequalities. This OMC has required Member States to submit National Action Plans to combat social exclusion and poverty and to promote the mainstreaming of equality between women and men in all actions taken, in particular by assessing the implications for both men and women at the different stages of the planning of, decision-making on, and monitoring of actions²; as well as in the identification of challenges, the design, implementation and assessment of policies and measures, the selection of indicators and targets and the involvement of stakeholders³.

Gender inequalities are also present in women's and men's access to, use of, and participation in health and long-term care. As it is well-known, women are the main providers of informal care for dependents (children and elderly) and they constitute the largest part of the labour force in the social and health sectors. However, they tend to spend their older years alone and require formal support more often than men.

¹ For the evolution of the Social Inclusion Process, see:

http://ec.europa.eu/employment_social/social_inclusion/index_en.htm.

² See the Old Common Objectives on Social Inclusion:

http://ec.europa.eu/employment_social/social_inclusion/docs/approb_en.pdf.

³ See the 2002 revision of the Old Common Objectives:

http://ec.europa.eu/employment_social/social_inclusion/docs/counciltext_en.pdf.

In order to better take into account the specific problems of men and women and make their care more effective, the joint objectives for developing care systems, as adopted by the Commission in 2004⁴ extending the OMC to the field of health and long-term care, underlined the importance of mainstreaming the gender dimension in the development of prevention and health policies. The objectives also stressed the need for account to be taken of the specific problems that men and women can face especially in human resources policy and the promotion of high-quality jobs.

In order to create a stronger, more visible OMC with a heightened focus on policy implementation and closer interaction with the revised Lisbon Strategy, in 2005 the Commission set forward detailed proposals for simplified and synchronized reporting in the fields of social inclusion, health and long-term care, and pensions. In its Communication⁵ on these new working methods, the Commission asked Member States to provide forward-looking National Strategy Reports on Social Protection and Social Inclusion which address the specific challenges of each of the these policy-fields, and draw out high-level and summary messages across the sector as a whole⁶. The policies are to be based on new common objectives adopted by the Council in March 2006⁷. In its joint opinion⁸ on the Commission's Communication, the Social Protection Committee and the Economic Policy Committee underlined that the gender perspective should be mainstreamed in each of the three policy fields, while the Council specified the promotion of equality between women and men as an overarching common objective for social protection and social inclusion.

The Commission in its Roadmap for equality between women and men, adopted in March 2006⁹, committed itself to eliminate the remaining gender inequalities. Amongst the actions it proposed for the next four years, the Roadmap underlined the need to monitor and strengthen gender mainstreaming in this simplified and reinforced OMC. The function of a network of experts in gender equality, social inclusion, health and long-term care will therefore be to assist the Commission in this task.

⁴ See the Commission Communication on "Modernising social protection for the development of high-quality, accessible and sustainable health care and long-term care: support for the national strategies using the open method of coordination"; COM(2004) 304, available at: http://europa.eu/eur-lex/en/com/cnc/2004/com2004_0304en01.pdf.

⁵ See the Commission Communication on "Working together, working better: A new framework for the open coordination of social protection and inclusion policies in the European Union"; COM(2005) 706, available at: http://ec.europa.eu/employment_social/social_inclusion/docs/com_2005_706_en.pdf.

⁶ For the first National Strategy Reports for Social Protection and Social Inclusion, submitted in 2006, see: http://ec.europa.eu/employment_social/social_inclusion/naps_en.htm.

⁷ See the New Common Objectives from 2006: http://ec.europa.eu/employment_social/social_inclusion/docs/2006/objectives_en.pdf.

⁸ See the Joint Opinion of the Social Protection Committee and the Economic Policy Committee on the Commission Communication on "Working together, working better: proposals for a new framework for the open co-ordination of social protection and inclusion policies": http://ec.europa.eu/employment_social/social_inclusion/docs/2006/opinion_en.pdf.

⁹ COM(2006) 92 final of 1/3/2006. The document is also available at the following website: http://ec.europa.eu/employment_social/gender_equality/gender_mainstreaming/roadmap_en.html.

The network will be supported by the new financial instrument PROGRESS¹⁰, one of whose sections is dedicated to the promotion of equality between women and men.

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

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

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

The Decision n°1672/2006 establishing a Community programme for employment and social solidarity – PROGRESS was adopted by the European Parliament and the Council on 24 October and published in the OJ on 15 November.

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

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

More specifically, PROGRESS will support:

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

¹⁰ Decision n°1672/2006 establishing a Community programme for employment and social solidarity – PROGRESS, adopted by the European Parliament and the Council on 24 October 2006 (OJ L 315/1 15.11.2006)

http://eur-lex.europa.eu/LexUriServ/site/en/oj/2006/l_315/l_31520061115en00010008.pdf

- (5) the effective implementation of the principle of gender equality and promotion of its mainstreaming in all EU policies (section 5).

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

- (a) to improve the knowledge and understanding of the situation prevailing in the Member States (and in other participating countries) through analysis, evaluation and close monitoring of policies;
- (b) to support the development of statistical tools and methods and common indicators, where appropriate broken down by gender and age group, in the areas covered by the programme;
- (c) to support and monitor the implementation of Community law, where applicable, and policy objectives in the Member States, and assess their effectiveness and impact;
- (d) to promote networking, mutual learning, identification and dissemination of good practice and innovative approaches at EU level;
- (e) to enhance the awareness of the stakeholders and the general public about the EU policies and objectives pursued under each of the policy sections;
- (f) to boost the capacity of key EU networks to promote, support and further develop EU policies and objectives, where applicable.

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

3. Subject of the contract

In order to ensure an effective gender mainstreaming of social inclusion and health and long-term care policies, there is a need for regular information and analysis on 1.) the factors that render women and men respectively vulnerable to the risk of social exclusion and poverty, and on the extent to which the gender dimension is taken into account in national social inclusion policies; as well as on 2.) existing gender inequalities in health status, access to, use of and participation in health and long-term care, and the factors that lay behind such differences, as well as on the extent to which the gender dimension is taken into account in national health and long-term care policies; and on 3.) the potential for gender equality policies to contribute to efforts aimed at tackling specific aspects of poverty and social exclusion, as well as of health and long-term care. Furthermore, there is also need for the development of methodological guidelines on how the gender dimension can be properly integrated into social inclusion, health and long-term care policies.

The contract therefore entails the constitution of a network of experts in gender equality, social inclusion and health and long-term care. The contract will be drawn up for one year with the possibility of its renewal three times, and will cover the 27 Member States and the EEA/EFTA countries (Iceland, Lichtenstein, and Norway).

While the participation of the EEA/EFTA countries (Iceland, Lichtenstein, and Norway) is foreseen in the contract, it will be dependent on the conclusion of their participation agreement in the PROGRESS programme.

Additional contracts for candidate countries participating in the programme will be concluded if needed after the signature of the respective memoranda of understanding on the basis of the negotiated procedures according to Article 126, 1, f of the Implementing Rules of the Financial Regulation.

The network will be managed and co-ordinated by a lead-coordinator, who will be assisted by a coordinating team of a small number of highly qualified experts and administrative assistant(s). The lead-coordinator and the coordinating team will be responsible for the setting-up and the management of the network, as well as for the high quality of the reports.

The network will be asked to provide:

- Two thematic reports per year¹¹, which will focus on gender issues relating to social inclusion and to health and long-term care. The reports will cover the EU Member States and the EEA/EFTA countries (Iceland, Lichtenstein, and Norway), and they will not exceed 100 pages. They will be based on national reports for each of the countries.
- In the years when Member States submit National Strategy Reports on Social Protection and Social Inclusion, which is next foreseen in 2008, one of the thematic reports will be replaced by an assessment report. This report will provide an accurate synthesis of the gender dimension in the common overview, social inclusion and health and long-term care parts of the National Strategy Reports¹², based upon national analysis for each of the Member States. For the EEA/EFTA countries (Iceland, Lichtenstein, Norway), an analysis of the gender dimension in their social inclusion and health and long-term care policies will be expected, given that the governments of these countries will not submit National Strategy Reports.
- Succinct responses, sometimes under tight deadlines, to requests for ad-hoc information from the Commission.

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.

¹¹ For examples of the thematic reports please see the reports executed by the Group of Experts on Gender, Social Inclusion and Employment (whose contract will expire in June 2007), available at: http://ec.europa.eu/employment_social/gender_equality/gender_mainstreaming/gender/exp_group_en.html.

¹² For the structure of the National Strategy Reports on Social Protection and Social Inclusion, see the Guideline that was issued to Member States in the preparation of their 2006 reports: http://ec.europa.eu/employment_social/social_inclusion/docs/2006/guidelines_en.pdf. The Guideline will be updated for the next round of reporting, which will take place in 2008, but its structure will remain the same.

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

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

5. Tasks to be carried out by the contractor

The contractor will be responsible for the setting up of the network of experts in gender equality, social inclusion, health and long-term care, which will be managed and coordinated by a lead-coordinator, who will be assisted by a coordinating team of a small number of highly qualified experts and administrative assistant(s). The contractor will also be responsible for the execution of the following tasks which the lead-coordinator, the coordinating team and the experts of the network will have to perform:

1. The lead-coordinator and the coordinating team will ensure the **management of the network**, including the administration, the translation, and the proofreading that is necessary for the execution of the tasks indicated hereafter. The lead-coordinator and the coordinating team will ensure the high quality of the reports and the liaison with the experts of the network as well as with the Commission services.

2. The lead-coordinator and the coordinating team will ensure the drafting and delivery to the Commission of **two thematic reports per year** (max 100 pages each), based upon national analyses executed by the experts and covering all 30 countries in the present call, as well as a summary (around 10 pages) of the reports. The reports will deal with gender issues in social inclusion and health and long-term care. The topics to be treated will be indicated by the Commission in the beginning and at mid-term of the contractual year. The reports will be transmitted to the Commission in English, while the summary will be transmitted in English, German and French. The reports and the national analyses must be sent to the Commission by electronic mail as well as on an electronic carrier, such as CD. The reports and the national analyses should be provided in a quality and format that is suitable for publication as some or all of them may be published. The dissemination of the reports and the national analyses outside the network is the responsibility of the Commission.

3. In the year(s) when Member States submit National Strategy Reports on Social Protection and Social Inclusion, which is next foreseen for 2008, **one of the thematic reports will be replaced by an assessment report**, containing an accurate synthesis of the gender dimension in the National Strategy Reports on Social Protection and Social Inclusion (common overview, social inclusion, health and long-term care parts), and covering the EU Member States, as detailed below.

The experts will ensure:

- The drafting and delivery of an analysis of gender mainstreaming and gender equality measures in the National Strategy Reports. The analyses must be written in English and sent by electronic mail to the lead-coordinator and the Commission.

The first part of this analysis will be maximum 5 pages long and will be submitted in advance of the National Strategy Reports. It will highlight gender equality measures in national social inclusion and health and long-term care policies, and include a quantitative analysis of principal indicators disaggregated by sex, as well as an overview of the main recent developments in national social inclusion and health and long-term care policies from a gender equality perspective.

The second part of this analysis will be a rapid reaction response to be submitted 3 working days after the receipt of the National Strategy Reports by the experts. It will be maximum 2 pages long and it will highlight the presence and adequacy of the gender dimension in the common overview, social inclusion, health and long-term care parts of the National Strategy Reports.

The full analysis will be submitted to the Commission 10 calendar days after the receipt of the National Strategy Reports by the experts. It will contain the first and second part as described above, and detailed information on the presence and adequacy of the gender dimension in the common overview, social inclusion, health and long-term parts of the National Strategy Reports.

The lead-coordinator, assisted by the coordinating team, will ensure:

- The delivery of a short draft of an assessment report in English, highlighting the main elements and conclusions of the gender mainstreaming and gender equality measures in the National Strategy Reports within 20 calendar days from the deadline set for Member States to submit them. This draft will be based on the contributions of the network experts and will be sent by electronic mail to the Commission.

- The drafting and delivery of the full assessment report in English on gender mainstreaming and gender equality measures in the National Strategy Reports. This report will be based on the contributions of the network members and will cover all the Member States. It will be sent to the Commission in the 40 calendar days following the deadline set for Member States to submit their National Strategy Reports. It will have in annex the country analyses. The report must be sent to the Commission by electronic mail, as well as on an electronic carrier, such as CD.

A parallel work programme will be drawn up for the analysis concerning the EEA/EFTA countries, as their governments will not submit National Strategy Reports.

The dissemination of all reports outside the network is the responsibility of the Commission. The deadlines indicated above are indicative and may be subject to discussion between the contractor and the Commission. The specifications and exact deadlines will be contained in a work programme to be agreed upon with the Commission at least two months in advance of the submission by Member States of the National Strategy Reports.

4. The drafting and delivery of responses to requests from the Commission for **ad-hoc information** in relation to specific and sometimes urgent questions. These may be of a horizontal nature or may be specific to individual countries.

5. The coordinator will ensure the preparation and organization of **two annual meetings** (one day each) gathering the whole network in Brussels. Moreover, the coordinator will be responsible for drafting the minutes of these two meetings. The date and the agenda of the two meetings will be agreed upon with the Commission. The meetings will be held in one of the Commission's buildings. English will be the working language (without interpretation facilities). If necessary, three or four meetings in Brussels between the coordinator and members of the coordinating team and the Commission could be organized in order to clarify the tasks expected.

6. The contractor may be asked by the Commission to present the outcome of its work and to participate in certain events, such as seminars and conferences, up to three or four times during the contractual year. Such participation will be signalled by the Commission in due time prior to the event. The associated costs for travel and subsistence will be covered by the budget of the contract and therefore need to be foreseen in the proposed price.

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

The PROGRESS Programme aims at promoting gender mainstreaming in all its five policy sections and commissioned or supported activities. Consequently, the Contractor will take the necessary steps to aim at the respect of gender balance at all levels of its proposed team and/or staff.

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

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

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

6. Professional qualifications required

See Annex IV of the draft contract.

Additional requirements:

The Contractor will need to involve experienced experts and/or academics, specialized in social inclusion, health and long-term care, and gender equality issues, showing capability to cover the 27 Member States and the EEA/EFTA countries (Iceland, Lichtenstein, Norway), including knowledge of the national languages. The

contractor will need to show experience in running large scale networks at European level and a proven capacity to manage the administrative and financial aspects of such a project.

7. Time schedule and reporting

See Article I.2. of the draft contract.

The contract is concluded for a period of 12 months with effect from the date on which it enters into force (this is foreseen for autumn 2007).

The contract may be renewed a maximum of three times, each time for a period of 12 months, depending on the availability of budget credits at the time of renewal.

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

See deadlines for reporting as stated in point 5 "Tasks to be performed by the Contractor".

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

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

8. Payments and standard contract

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

- a pre-financing payment of 20% following the signature of the contract
- an interim payment of 60% after the interim report and relevant invoices are accepted by the Commission
- a final payment to cover the balance due under the contract after the final report and relevant invoices are accepted by the Commission

In drawing up the bid, the tenderer should take into account the provisions of the standard contract comprising the "General conditions".

In particular, as mentioned in the section on "guide on how the tasks are to be carried out", the Contractor is required to detail in its final activity report its achievements in meeting the described equal opportunities provisions.

9. Prices

The total yearly budget for this service contract ought not to exceed 500 000 EUR.

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

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

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 as well as for the coordinator(s). The unit price should cover the experts' fees and administrative expenditure, but not the travel and subsistence expenses referred to below.
- Translation expenses.
- Travel expenses (other than local transport costs).
- Subsistence expenses of the Contractor and his staff (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 the performance of the tasks.
- Other direct costs (to be specified in detail), if applicable, by the tenderer.

Total price = professional fees and direct costs

10. Groupings of economic operators or consortia

Tenders can be submitted by groupings of service providers/suppliers who will not be required to adopt a particular legal form prior to the contract being awarded, but the consortium selected may be required to assume a given legal form when it has been awarded the contract if this change is necessary for proper performance of the contract¹³. However, a grouping of economic operators must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination. The

¹³ 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.

documents required and listed in the following points 11 and 12 must be supplied by every member of the grouping.

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

11. Exclusion criteria and supporting documents

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

Those articles are as follows:

Article 93

Applicants or tenderers shall be excluded if:

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

Article 94

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

- a.) are subject to a conflict of interest.

2.) The tenderer to whom the contract is to be awarded shall provide, within a time limit defined by the contracting authority and preceding the signature of the contract,

the evidence referred to in Article 134 of the implementing Rules, confirming the declaration referred to in point 1 above.

Article 134 of the Implementation Arrangements – Supporting documents

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

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

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

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

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

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 they are still valid.

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

12. Selection criteria

Candidates must provide evidence of their economic, financial, technical and professional capacity in accordance with the criteria set out below:

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

1. A statement of the undertaking's overall turnover for the last two financial years. For the last financial year, the annual turnover should at least equal 50% of the annual value of the contract, which, in the case of tenders by consortia, may be provided for by taking the sum of the turnover of all partners together.

2. Balance sheets or extracts from balance sheets from the last two financial years for which accounts have been closed, where publication of the balance sheets is required under the company law in the country in which the economic operator is established.

In case the documents listed above cannot be provided, then evidence should be given that there is no legal obligation of publishing annually the turnover and/or the balance sheets. In this case a bank declaration providing evidence of good financial standing may be accepted by the contracting authority.

In the case of tenders from consortia, these documents must be provided for 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 may prove his economic and financial capacity by any other means which the contracting authority considers appropriate.

b) Technical and professional capacity to carry out the contract to be assessed on the basis of the following:

The skills needed for this contract are as follows:

- the lead coordinator, members of the coordinating team (except for the administrative assistant(s)), and the experts shall have an economic and/or social background and appropriate professional experience, as attested by their CVs;
- the lead coordinator shall have appropriate experience at EU level in the fields of social inclusion and/or health and long-term care, with knowledge of gender equality issues, as attested by the CV. Moreover, the lead-coordinator must demonstrate strong analytical and synthesis skills and ability to conduct socio-economic research; ability to prepare reports as well as planning and organising skills to co-ordinate the work of the experts in order to meet the deadlines, as attested by the CV;
- the members of the coordinating team (except for the administrative assistant(s)) shall have an appropriate experience in the fields of social inclusion, health and long-term care, with knowledge of gender equality issues, as attested by their CVs. The members must demonstrate strong analytical and synthesis skills and ability to conduct socio-economic research; ability to prepare reports as well as planning and organizing skills to co-ordinate the work of the experts in order to meet the deadlines, as attested by their CVs;

- the experts shall have appropriate experience at country level in the fields of social inclusion and/or health and long-term care, preferably both, and a knowledge of gender equality issues, as attested by their CVs;
- all members shall have appropriate language skills to ensure efficient access to information in the countries concerned as well as to actively participate in the network meetings and exchanges, as attested by their CVs;
- the lead coordinator and the members of the coordinating team shall have adequate technical capacity to prepare and organise meetings gathering the whole network.

Means of proof required:

- the tenderer must provide a list of the lead-coordinator, members of the coordinating team, and the experts of the network, together with their CVs and their qualifications. The CVs should include a list of main works in relation to the subject specified in this tender, including the organisation of meetings, undertaken within a maximum of eight years ago. Where the work was undertaken for the European Commission, the candidate must also include the Commission reference number of the contract and the department for which the contract was performed;
- a declaration by the tenderer certifying the competence of the network to carry out the services.

In the case of tenders from consortia, the tenderer must provide a clear identification of the lead-coordinator 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 of the network, and briefly describing their role.

Tenderers considered by the European Commission not to meet the above-mentioned requirements will be eliminated without further assessment.

13. Award criteria

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

1. Quality of the offer

A. Approach: 30% - Degree of understanding the nature of the assignment, its context and the results to be achieved.

B. Methodology: 40% - Methodology proposed to analyze and evaluate the gender dimension in national social inclusion and health and long-term care policies, both at coordinator and expert level, including for the production of the thematic and assessment reports. Details must also be provided on how the lead-coordinator and the coordinating team will ensure the implementation and follow-up, the quality, the homogeneity and consistency of the work provided by the experts.

C. Work organization: 30% - Work organization proposed for the management of the network by the lead-coordinator, in order to meet the sometimes tight deadlines and to ensure the geographical coverage of all countries included in this present call. Work organization at the administrative level, including the number of people involved in the administrative management, details about the organization of meetings, the delivery of work, how contacts with the network will be guaranteed, for instance in order to answer to specific questions and to execute the requested tasks under the given deadlines.

2. Price

Please note that the contract will not be awarded to any bid that receives less than 70 % in the quality of the offer. The points total will then be divided by the price, with the highest-scoring bid being chosen.

The Commission may, before the contract is signed, either abandon the procurement or cancel the award procedure without the candidates or tenderers being entitled to claim any compensation.

14. Content and presentation of bids

Content of bids

The tenderer must provide all information and documents necessary to enable the Commission to appraise the bid on the basis of the selection and award criteria (see points 12 and 13 above) and taking account of the exclusion criteria listed in point 11 above.

Tenders must be presented in three parts:

a.) a **first part** containing all administrative information, including:

- date of bid for the provision of services
- name of tenderer, full address, telephone and fax numbers and e-mail address;
- a "legal entity" form duly completed;
- 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;
- date of establishment or registration;
- the name and function of the contractor's legal representative (i.e. the person duly authorised to act legally on behalf of the contractor in any legal dealings with third parties);
- VAT number or proof of exemption;

b.) a **second part** containing the technical content of the bid and including:

- a description of the intended organization and internal management of the services and tasks to be carried out;
- a detailed description of the planned approach and methodology to be used;

- details of the proposed project team and an explanation of the nature and extent of their participation in the work and organization of the network;
- detailed curriculum vitae of project team members, including national experts;
- if not already covered elsewhere, the tenderer must supply specific information covering each of the award criteria listed in point 13.

c.) a **third part** containing the financial part of the tender and including:

- full details of the proposed price presented as described in point 9 above and following the format of Annex III of the attached blank draft contract;
- a bank ID form duly completed and signed and stamped by the bank;
- a statement of the undertaking's overall turnover for the previous two financial years – for the last financial year the annual turnover should at least equal 50% of the annual value of the contract, which, in the case of tenders by consortia, may be provided for by taking the sum of the turnover of all partners together;
- balance sheets or extracts from balance sheets for the last two financial years for which accounts have been closed, where publication of the balance sheets is required under the company law in the country in which the economic operator is established;
- In case the documents listed above cannot be provided (in which case evidence should be given that no legal obligation exists of publishing annually the turnover and/or the balance sheets), a bank declaration providing evidence of good financial standing may be accepted by the contracting authority.

Presentation of bids

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

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

They must be clear and concise.

They must be signed by the legal representative. **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.

Annex I

| Exclusion criteria (Article 93(1) FR) | Supporting documents to be provided by the successful tenderer to whom the contract is awarded | |
|--|---|--|
| | Procurement (Article 93(2) FR; Article 134 IR) | |
| 1. Exclusion from a procurement procedure, Article 93(1) FR : <i>« Candidates or tenderers shall be excluded from participation in a procurement procedure if:</i> | | |
| 1.1. (subparagraph a) <i>they are bankrupt or being wound up,</i> <i>are having their affairs administered by the courts,</i> <i>have entered into an arrangement with creditors have suspended business activities, are the subject of proceedings concerning those matters,</i> <i>or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations¹⁴;</i> | Recent extract from the judicial record or recent equivalent document issued by a judicial or 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) <i>they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata¹⁵;</i> | Cf. supporting documents for Article 93(1)(a) FR above | |

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

¹⁵ Cf. footnote n° 14.

| Exclusion criteria (Article 93(1) FR) | Supporting documents to be provided by the successful tenderer to whom the contract is to be awarded | |
|--|--|--|
| | Procurement (Article 93(2) FR; Article 134 IR) | |
| 1.3. (subparagraph c) <i>they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;</i> | Declaration by the candidate or tenderer that he is not in the situation described | |
| 1.4. (subparagraph d) <i>they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed¹⁶;</i> | 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 | |
| 1.5. (subparagraph e) <i>they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests¹⁷;</i> | Cf. supporting documents for Article 93(1)(a) FR above | |
| 1.6. (subparagraph f) <i>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. »</i> | Declaration by the candidate or tenderer that he is not in the situation described | |

¹⁶ Cf. footnote n°14.

¹⁷ Cf. footnote n° 14.

| Exclusion criteria (Article 94 FR) | Supporting documents to be provided by the successful tenderer to whom the contract is awarded | |
|---|---|--------|
| | Procurement | Grants |
| 2. Exclusion from a procurement or grant award procedure Article 94 FR : « <i>Contracts may not be awarded to candidates or tenderers who, during the procurement procedure:</i> | | |
| 2.1. (subparagraph a) <i>are subject to a conflict of interest;</i> | Statement by the applicant, tenderer or bidder confirming the absence of conflict of interests, to be submitted with the application, bid or proposal | |
| 2.2. (subparagraph b) <i>are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information»¹⁸.</i> | No specific supporting documents to be supplied by the applicant, tenderer or bidder It is the responsibility of the authorising officer, represented by the evaluation committee, to check that the information submitted is complete ¹⁹ and to identify any misrepresentation | |

¹⁸ 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 proof or to clarify the supporting documents establishing financial and operational capacity, within a specified time-limit. »

¹⁹ Cf. footnote n°18

DECLARATION ON HONOUR

I, the undersigned, Mrs./Mr....., in the capacity of.....(*indicate your job title*),
certify that the.....(*indicate company name*)

Article 93

- a) *is not bankrupt or being wound up,
does not have their affairs administered by the courts,
has not entered into an arrangement with creditors, has not suspended business
activities, is not the subject of proceedings concerning those matters,
or is not in any analogous situation arising from a similar procedure provided for
in national legislation or regulations;*
- b) *has not been convicted of an offence concerning their professional conduct by a
judgment which has the force of res judicata;*
- c) *has not been guilty of grave professional misconduct proven by any means which
the contracting authority can justify;*
- d) *has 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*
- e) *has not 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;*
- f) *following another procurement procedure or grant award procedure financed by
the Community budget, has not been declared to be in serious breach of contract for
failure to comply with their contractual obligations. »*

Article 94

- a) *is not subject to a conflict of interest;*

Date:.....

Signature:

Name :.....

Job title :.....