



# Establishment and management of a Social Policy Network VT/2013/069

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## **1. Title of the contract**

### **ESTABLISHMENT AND MANAGEMENT OF A SOCIAL POLICY NETWORK**

## **2. Background**

### **2.1. The Europe 2020 Strategy and the new economic governance**

The EU's Europe 2020 strategy for smart, sustainable and inclusive growth was launched by the European Commission in March 2010 and approved by the Heads of States and Governments of the EU in June 2010.<sup>1</sup> The strategy sets out headline targets to be achieved within this decade in the areas of employment, education, energy use and innovation in order to overcome the impact of the financial crisis and put Europe back on track for economic growth.

The fight against unemployment and poverty is at the heart of the strategy. In this respect, three out of the five headline targets are of paramount importance in the social policy area, specifically the targets on:

- 75 % of the population aged 20-64 to be employed;
- The share of early school leavers to be brought under 10% and at least 40% of 30-34 year olds to achieve a higher education degree;
- The number of people in, or at risk of, poverty or social exclusion to be reduced by at least 20 million.

In addition to these targets, the Commission also proposed seven flagship initiatives to support and guide Member States with the implementation of the strategy. The flagship initiatives most relevant for the social dimension are the "European platform against poverty", "Youth on the Move" and "An agenda for new skills and jobs".

The Europe 2020 strategy is underpinned by a set of Integrated Guidelines, comprising three Employment and one Social Policy Guidelines (from nr 7 to nr 10).<sup>2</sup> These give guidance to the Member States for the preparation of the National Reform Programmes and their implementation.

The annual cycle of **the European Semester** begins with the Commission's Annual Growth Survey (including the Joint Employment Report), which gives broad guidance on priority actions to be taken at EU and national level. Member States then submit Stability or Convergence Programmes on their fiscal plans and National Reform Programmes on structural reforms and measures to boost growth and jobs. The Commission assesses these reports based on an integrated analysis covering fiscal, macroeconomic, employment, social and structural policies. On that basis, concrete policy recommendations for each country are proposed and discussed in the respective Council formations (EPSCO, ECOFIN) before being adopted by the European Council. These recommendations have to be duly considered when governments draw up their draft budgets.

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<sup>1</sup> [http://ec.europa.eu/europe2020/index\\_en.htm](http://ec.europa.eu/europe2020/index_en.htm)

<sup>2</sup> [http://europa.eu/legislation\\_summaries/employment\\_and\\_social\\_policy/eu2020/em0028\\_en.htm](http://europa.eu/legislation_summaries/employment_and_social_policy/eu2020/em0028_en.htm)

In the second part of the year, during the so-called national semester, Member States finalise national budgets and policy measures taking into account the EU and country-specific guidance received. In its Annual Growth Survey of the following year, the Commission assesses how Member States have taken the guidance into account.

The December 2011 European Council has acknowledged the importance of complementing the new economic governance with enhanced monitoring of employment and social policies. Furthermore, with the approval of the "Compact for Growth and Jobs"<sup>3</sup>, the June 2012 European Council stressed the need to tackle unemployment and the social consequences of the crisis effectively at national level, while pursuing growth-level fiscal consolidation processes, and called for urgent measures to be implemented by the European Union to improve the functioning of the Single Market, the energy market, the European Research Area, cohesion policy. They also called upon the European Investment Bank to mobilise EUR 120 billion to boost the financing of the economy.

The so-called Social Protection Performance Monitor (SPPM) strengthens the monitoring function of the social situation in Europe by the SPC (art. 160 TFEU), through providing the ability to identify main common social trends and reinforcing the multilateral surveillance capacity of the SPC. In doing so it enhances the Committee's role in the European Semester and in supporting EPSCO to bring social issues to the attention of the European Council. The SPPM was endorsed by the Council in October 2012.

The Social Investment Package, adopted on 20 February 2013, provides guidance to Member States on how to adapt their social models to the social consequences of the economic crisis and long-term demographic trends such as population ageing, as well as changing family structures and labour market trends in the 21st century. By drawing on good practices of some Member States, the package sets out a policy framework to help guide Member States' reforms. The social policy guidance set out in the package combined with concrete EU support will also help Member States to deliver on the Europe 2020 strategy. A more detailed description of the package can be found in Section 2.4.

In December 2011, two sets of regulations on the co-ordination of EU economic policies, the so called 'Six Pack', entered into force; a further 'Two-Pack' of regulations was approved in June 2012.<sup>4</sup> The former package strengthened Member States' commitment to budgetary balance and surveillance procedures, including corrective measures for non-compliant countries, whereas the latter established a procedure of preventive review by the Commission and the Eurogroup of the draft budgetary plans of the euro-area Member States.

## **2.2. The European Social Fund (ESF)**

The ESF is the main financial tool through which the EU translates its strategic labour market, human resources development and social inclusion policy aims into action.

Article 2 of the ESF Regulation 1081/2006<sup>5</sup> states that the ESF shall contribute to the priorities of the Community regards strengthening economic and social cohesion. It shall do so by supporting Member States' policies aiming to achieve full employment and quality and productivity at work and to promote social inclusion.

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<sup>3</sup> [http://www.consilium.europa.eu/uedocs/cms\\_Data/docs/pressdata/en/ec/131388.pdf](http://www.consilium.europa.eu/uedocs/cms_Data/docs/pressdata/en/ec/131388.pdf)

<sup>4</sup> [http://ec.europa.eu/economy\\_finance/articles/governance/2012-03-14\\_six\\_pack\\_en.htm](http://ec.europa.eu/economy_finance/articles/governance/2012-03-14_six_pack_en.htm)

<sup>5</sup> <http://ec.europa.eu/esf/main.jsp?catId=33&langId=en>

The Commission's regulatory package on Structural Funds for 2014-2020<sup>6</sup> proposes that at least 20% of ESF funding targets the social inclusion objectives. In particular the ESF proposed Regulation identifies in Art.3.1.c the following thematic objective and intervention priorities:

Promoting social inclusion and combating poverty through:

- Active inclusion;
- Integration of marginalised communities such as the Roma;
- Combating discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation;
- Enhancing access to affordable, sustainable and high-quality services, including health care and social services of general interest;
- Promoting the social economy and social enterprises;
- Community-led local development strategies.

The ESF will also promote social policy innovation, in particular with the aim of testing and scaling up innovative solutions to address social needs; it will also provide support to a larger scale for the measures identified by the Progress successor programme (see point 2.4). The Commission will facilitate capacity building for social innovation, in particular through supporting mutual learning, establishing networks, and disseminating good practices and methodologies.

The ESF will support Member States in pursuing the priorities and headline targets of the Europe 2020 strategy for smart, sustainable and inclusive growth and the Social Investment Package taking into account the integrated guidelines for the economic and employment policies of Member States and the Council Recommendations on the National Reform Programmes.

### **2.3. The PROGRESS programme**

PROGRESS<sup>7</sup> is the EU employment and social solidarity programme, set up to provide financial support for the attainment of the European Union's objectives in employment, social affairs and equal opportunities as set out in the Social Agenda<sup>8</sup>, as well as to the objectives of the Europe 2020 Strategy. 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 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 (see below);

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<sup>6</sup> <http://ec.europa.eu/esf/main.jsp?catId=62&langId=en>

<sup>7</sup> 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

<sup>8</sup> 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 21<sup>st</sup> century Europe COM/2008/0412 final of 02.07.2008.

- 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;
- Relaying the views of the stakeholders and society at large.

More specifically, PROGRESS provides support in the following areas:

- The implementation of the European Employment Strategy (section 1);
- The implementation of the open method of coordination in the field of social protection and inclusion (section 2);
- The improvement of the working environment and conditions including health and safety at work and reconciling work and family life (section 3);
- The effective implementation of the principle of non-discrimination and promotion of its mainstreaming in all EU policies (section 4);
- The effective implementation of the principle of gender equality and promotion of its mainstreaming in all EU policies (section 5).

The present call for tenders is issued in the context of the implementation of the 2013 annual work plan which can be consulted at: <http://ec.europa.eu/social/main.jsp?catId=625&langId=en>

#### **2.4. The new EU Programme**

As PROGRESS is ending in 2013, the Commission has adopted its proposal<sup>9</sup> for a new programme on the 6th of October 2011, the Programme for Social Change and Innovation (PSCI).<sup>10</sup> This new programme should come into effect on 1st January 2014.

The Commission's proposal for the new Programme integrates and extends the coverage of three existing programmes: Progress (Programme for Employment and Social Solidarity), EURES (European Employment Services) and the European Progress Microfinance Facility. The general objectives of the programme are defined as below:

- (a) Strengthen ownership of the Union objectives in the employment, social and working conditions fields among key Union and national policy-makers, as well as other interested parties in order to bring about concrete and coordinated actions at both Union and Member State level.
- (b) Support the development of adequate, accessible and efficient social protection systems and labour markets and facilitate policy reform, by promoting good governance, mutual learning and social innovation.
- (c) Modernise Union law in line with the Smart Regulation principles and ensure that Union law on matters relating to working conditions is effectively applied.

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<sup>9</sup> COM(2011) 609 final

<sup>10</sup> <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2011:0609:FIN:EN:PDF>

- (d) Promote workers' geographical mobility and boost employment opportunities by developing Union labour markets that are open and accessible to all.
- (e) Promote employment and social inclusion by increasing the availability and accessibility of microfinance for vulnerable groups and micro-enterprises, and by increasing access to finance for social enterprises.

The PROGRESS axe of the new Programme is foreseen to continue the current activities of PROGRESS (i.e. policy coordination, sharing of best practices, capacity-building and testing innovative policies). It would also increase its contribution to social policy experimentation and to the identification of good practices, the aim being to up-scale the most successful measures with the support of the new European Social Fund.

The European Parliament and the Council reached a political agreement regarding the new Programme on the 28 June 2013, including for a new name the "EU Programme for Employment and Social Innovation" (EaSI).

All activities commencing after the 1st of January 2014 under this contract will have to take into consideration the changes related to the new Programme and will have to satisfy with the implementing conditions including in term of monitoring and evaluation. The Commission might change the objectives, activities, specifications and deliverables of the contract accordingly, during the extension for 2014 and onwards.

## **2.5. The social investment package**

On 20 February 2013 the European Commission adopted a Social Investment Package comprising a Communication on "Social Investment for Growth and Cohesion" (COM(2013)83), a Recommendation on 'Investing in Children' (C(2013)778), and staff working documents covering different areas of social policy. The Social Investment Package (SIP) supports MS in their implementation of the Europe 2020 strategy and achievement of its targets and gives guidance on making their social policies more efficient and effective in response to the significant challenges they currently face.

The Communication sets out a policy framework, concrete actions to be taken by Member States and the Commission, and guidance on the use of EU funds to support reforms.

The Recommendation gives guidance to Member States on policies to address child poverty and social exclusion and promote children's well-being.

The policy framework of the package is based on three integrated pillars:

- **Spending more effectively and efficiently to ensure adequate and sustainable social protection.** This can be achieved through simplifying the administration of benefits and services, targeting them better and making them conditional (on participating in training, for example).
- **Investing in people's skills and capacities to improve people's opportunities to integrate in society and the labour market.** Examples of this are education, childcare, healthcare, training, job-search assistance and rehabilitation.



- **Ensuring that social protection systems respond to people's needs at critical moments during their lives.** This means investing as early as possible to prevent hardship from arising later and 'preparing' people against life's risks rather than simply 'repairing'. Investing in children and young people is therefore important.

On the basis of the policy guidance in the social investment package and on strengthened input from relevant stakeholders, the Package will inform the Country Specific Recommendations in the framework of the European Semester. Member States' performance on social investment will also be assessed by the Social Protection Committee in the framework of the Social Open Method of Coordination. Performance will be assessed through indicators underpinning the employment and poverty targets of the Europe2020 strategy and those included in the Social Protection Performance Monitor.

Various EU funds will also support Member States to implement the priorities set out in the SIP. The European Social Fund (ESF) will be the EU's main financial instrument to catalyse the implementation of the SIP. To this end, the Commission is finalising operational guidance on how Member States can best use the ESF to support social investment in all four of the ESF's investment priority areas: promoting employment, investing in education, combatting poverty and enhancing institutional capacity. Affordable high-quality childcare and education, prevention of early school leaving, training and job-search assistance, housing support and accessible health care are all policy areas with a strong social investment dimension.

The network will make an important contribution to supporting the implementation of the social investment approach by Member States, involving as many stakeholders as possible. To this end, the network will support the Commission and Member States with policy expertise, capacity building and support for exchange of good practice and co-operation.

## **2.6. The open method of coordination**

The Open Method of Coordination (OMC) was launched in 2001 in the area of social inclusion and subsequently extended to pensions, health and long term care.

The OMC is based on the definition of common, albeit not legally binding, objectives. Member States report in their national strategies and action plans how they try to achieve these objectives. The OMC is underpinned by common indicators and monitoring mechanisms developed with the Member States in the Social Protection Committee (SPC) and its Indicators Sub-Group (ISG).

The integration of the social OMC into the Europe 2020 strategy provides a stronger basis for the EU to meet its social goals. The instruments and tools that have been developed under the Social OMC are being adapted to the governance architecture of Europe 2020, to best serve the purposes of the new strategy.

The EPSCO Council conclusions of 6 December 2010 on *The Social dimension in the context of an integrated Europe 2020 Strategy*<sup>11</sup> invited the Commission to support the work of the SPC in its areas of competence of the social dimension of Europe, and the SPC is invited to ensure the monitoring of the social situation and the development of social protection policies, including an assessment of the social dimension of Europe 2020.

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<sup>11</sup> [http://www.consilium.europa.eu/uedocs/cms\\_data/docs/pressdata/en/lsa/118244.pdf](http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/lsa/118244.pdf)

### **3. Subject of the contract**

#### **3.1. General Objective of the Contract**

This call for tender is aimed at establishing a structure for bringing together the work currently done by the independent experts on social inclusion for the assessment of national social inclusion policies (SI)<sup>12</sup> (contract expiration: February 2014) and the independent experts for the analytical support on social protection reforms (ASISP)<sup>13</sup> (contract expiration: April 2014). These previously independent networks will be merged into a single network of independent experts. The secretariat of this new merged network of independent experts will also be responsible for managing the government experts on social protection systems (the Mutual Information Systems on Social Protection (MISSOC)).<sup>14</sup>

The new network will ensure that these components work closely together to produce timely and high-quality information that is relevant to the EU policy needs, as explained above, and that this information is presented in the most user-friendly way to various audiences, including for the Commission's internal use and for public authorities, social partners, civil society, expert audiences and citizens.

The overall objective of this social policy network is to ensure expertise and provide rigorous assessments of European and national social policies and to foster a high-quality debate on innovative policy solutions in the spirit of the social investment approach. The network will be a tool to assist the European Commission in the formulation of evidence-based social policies. It will contribute in particular to the assessment of the National Reform Programmes and the National Social Reports, as well as equivalent policy documents for the non-EU countries covered by this contract, including enlargement countries (see below, 4.2).

The key role of the contractor consists of:

- (1) Establishing a coordinating secretariat (also referred to as the 'core team') responsible for organising the work of the independent experts and the governmental MISSOC experts and liaising with the Commission;
- (2) Setting up and managing a network of independent social policy experts and supervising their work consisting in:
- (3) Monitoring, researching and analysing on a regular basis key social policy and related socio-economic developments and trends in the Member States and other European countries covered by the network;
- (4) Assessing progress against the Europe 2020 National Reform Programmes of Member States; for enlargement countries, assessing progress with regard to national policy strategies and targets;
- (5) Reviewing specific social policy topics of European interest;
- (6) Responding to ad hoc requests for analysis of specific social policy-related issues not covered by the above activities.

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<sup>12</sup> <http://ec.europa.eu/social/main.jsp?catId=1025&langId=en>

<sup>13</sup> <http://www.socialprotection.eu/>

<sup>14</sup> <http://missoc.org/>

- (7) Disseminating the information collected through the network and core team in appropriate forms to the Commission services and the other audiences of the network;
- (8) Facilitating and managing an open platform for collecting and discussing responses to specific social policy challenges (the ‘knowledge bank’, see below 5.3).

### **3.2. Geographical coverage**

Tenderers must provide evidence that they can rely on a network of highly qualified independent experts capable of monitoring social inclusion challenges and policies, as well as social protection systems and reforms in all Member States and the countries indicated below. Governmental experts participating in MISSOC will continue to be appointed by the Member States’ authorities.

The network contract will cover:

- The EU Member States;
- The EEA-EFTA states and Switzerland<sup>15</sup>;
- The EU candidate countries and potential candidates<sup>16</sup> who participate in PROGRESS<sup>17</sup> and its successor programme, PSCI.

## **4. Tasks to be carried out by the contractor(s)**

### **4.1. Establishment of a coordinating Network secretariat (core team) and its tasks**

The contractor will establish a core team (secretariat) that will ensure, in close cooperation with the Commission, the quality and timely delivery of all requested outputs and services and take care of the management of the network experts. The core team members must have the necessary qualifications to work on the themes covered by the network, and organisational and informatics skills to ensure their proper functioning.

The core team will be led by an experienced project manager. The core team will act as a bridge between the Commission and the independent and government experts, provide the administrative, logistical and linguistic/editing support as well as the expertise on social protection and social inclusion issues that is required for the successful operation of the Social Policy Network.

The core team will, on the basis of guidance received from the Commission, elaborate annual work programmes and translate them into specific tasks for the experts (both independent and government). It will ensure the timely delivery of high-quality and consistent information by the experts, editing contributions and obtaining clarifications, where necessary.

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<sup>15</sup> The Agreement on the European Economic Area (EEA) brings together the 28 EU Member States and the three EEA-EFTA countries (Iceland, Liechtenstein and Norway); Switzerland fully participates in MISSOC activities and structure since 2002. However Switzerland does not participate in the PROGRESS programme and its participation in MISSOC is based on special terms and on a separate contract which must obligatorily be concluded between contractor and Switzerland in order to ensure the continued participation of Switzerland in this network.

<sup>16</sup> Currently, four countries participate in PROGRESS: Iceland, former Yugoslav Republic of Macedonia (FYROM), Turkey and Serbia. Provision should be made for up to 4 further countries.

<sup>17</sup> Other candidate countries or potential candidates included in the stabilisation and association process may join the PROGRESS Programme upon negotiating Memoranda of Understanding. If, during the contract period, any countries start to participate in the Programme, an extension of the contract will be made by negotiated procedure according to Article 126(1)(f) of Commission Regulation n° 2342/2002 (EC, Euratom) laying down detailed rules for the implementation of Council Regulation (EC, Euratom) No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities (Official Journal L 357 of 31/12/2002).

#### **4.2. Establishment of a network of independent experts**

The contractor will select and recruit independent experts capable of covering the above-mentioned social inclusion and social protection issues in the countries listed above. The costs of hiring the independent experts will be borne by the contractor (the government experts will not be remunerated by the contractor).

#### **4.3. Information collection by country experts**

The independent and government experts of the network will collect information on the following areas:

- developments (legislative and other) in Member States and other countries covered by this contract in the field of social policies in particular in the context of the Europe 2020 strategy, the progress towards relevant national and EU headline targets and the implementation of country specific recommendations;
- adequacy and sustainability of social protection systems, in particular sufficient minimum income, adequate pensions, housing support and accessible, high-quality and efficient health care and social services including social housing, as well as the efficient use of social policy budgets;
- the activating and enabling nature of policies and their capacity to promote adequate livelihoods through benefits and services that enhance human capital and raise people's capacity to participate in society and economy;
- investments in children and youth and the capacity of policies to break the intergenerational transmission of disadvantages;
- inclusion of migrants, Roma and other ethnic minorities, and homeless people and their protection against discrimination;
- innovation in social policies and their financing, analysis of potentials for scaling up successful innovations, and the role of the EU's programmes and structural funds, particularly the European Social Fund, in tackling social protection and social inclusion challenges;
- governance issues, including the role of national stakeholders, notably social partners, private companies and civil society, in the European and national semester and in the design and implementation of social policies.

#### **4.4. A Platform for gathering and discussing solutions to social policy challenges (the "Knowledge Bank")**

The Social Investment Package announced the establishment of a knowledge bank to facilitate the exchange of good practice. The contractor will be responsible for managing the content of this knowledge bank in the form of an open platform which will allow experts, stakeholders and policy makers to define social policy challenges, propose solutions and discuss their strengths, weaknesses, limitations and transferability.

The contractor will suggest an appropriate format and content structure of the knowledge bank, using tools and infrastructure provided by the Commission (wiki, forum etc.<sup>18</sup>). The platform

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<sup>18</sup> See IPG compatible options here: [http://ec.europa.eu/ipg/services/interactive\\_services/index\\_en.htm](http://ec.europa.eu/ipg/services/interactive_services/index_en.htm)

should allow registered users to present a challenge, to respond to challenges with suggestions for solutions/policy approaches, to present the available evidence on how successful these solutions were, to discuss solutions proposed by other users and to rate them. The contractor will be responsible for content management and facilitation. The contractor will be in charge of monitoring the activity on the platform and discarding any inappropriate content. The knowledge bank should be an open platform with read access for anonymous users and write access for registered users<sup>19</sup>.

Integration of the knowledge bank into Europa Portal has to be taken into account, therefore the content also should comply with the EU Information Providers Guide<sup>20</sup>.

The Social Policy Network should also become a major contributor to the knowledge bank (see below). Reports on specific issues (see below, main deliverables) should take relevant content of the knowledge bank into account or could even be based primarily on the content of the knowledge bank on a specific topic.

All content created by the contractor will be subject to EU copyright<sup>21</sup> and any relevant data sets (after EC approval) should be considered for publishing on the EU open data portal<sup>22</sup>.

Translations of content of the knowledge bank are not foreseen, but the contractor should be able to monitor submissions in all the languages of the countries covered by the Network.

All proposals and solutions will have to be discussed and agreed with the Commission at all stages of the project and in performance of this task, the contractor will have to coordinate closely with relevant EC services.

#### **4.5. Main Deliverables**

The core team will ensure that the information collected by the country experts is consistent and of high quality and delivered in the following formats:

- **Comparative tables of each country's main social protection schemes (as currently produced by the EU's Mutual Information System on Social Protection, MISSOC).**

These tables are to be updated twice a year, reflecting the state of legislation on the 1st of January and 1st of July and must be produced in English, French and German, the three working languages of MISSOC. The information for MISSOC will be provided by the official MISSOC correspondents appointed by the participating countries. The secretariat will be responsible for ensuring the highest possible degree of quality and consistency of the information published in the tables.

- **A wiki-type structure covering the social policy areas that are to be monitored and analysed on a regular basis.**

This wiki will be a reference source primarily for internal use by the Commission (although the option of wider access should be foreseen) and should be updated at least four times a year. It should include a description of challenges, national systems and policies/reforms and specific measures, as well as available evidence on their impact (only in English). The contractor should work towards an integrated presentation of the

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<sup>19</sup> [http://ec.europa.eu/dataprotectionofficer/privacy\\_statements\\_en.htm](http://ec.europa.eu/dataprotectionofficer/privacy_statements_en.htm)

<sup>20</sup> IPG: <http://ec.europa.eu/ipg/>

<sup>21</sup> [http://ec.europa.eu/ipg/basics/legal/notice\\_copyright/#section\\_1\\_1](http://ec.europa.eu/ipg/basics/legal/notice_copyright/#section_1_1)

<sup>22</sup> <http://open-data.europa.eu/en/>

information produced by the independent and governmental (MISSOC) experts in this wiki-type structure.

- **Reports on specific issues.**

The network will produce three reports on specific issues each year. The topics are to be defined in agreement with the Commission. The reports should normally cover all countries. The average length of each report is estimated at four to six pages per country, plus a cross-country executive synthesis of ten to fifteen pages. A report covering all countries can be replaced by several reports having a more limited geographic or thematic scope.

- **Flash reports on key developments and policy debates/initiatives in the countries covered.**

The core team should ensure that country experts deliver timely, concise and clear reports on significant developments (e.g. reform proposals/initiatives, new evidence on social challenges). These reports should be compiled, together with other relevant information on the network's deliverables, in a monthly electronic newsletter. Such flash reports may also be requested by the Commission, if they have not been submitted spontaneously by the experts. This work will may also feed into other deliverables of the network.

- **Feeding relevant material into the knowledge bank.**

The network will contribute to the knowledge bank by identifying challenges in the countries it covers, proposing solutions that have already been developed or tested and assessing their effectiveness and transferability.

Each country expert should propose one policy challenge (which may be common to a number of countries) per year (so a total of around 30) to which other experts would present policy responses based on their experience.

The network core team and country experts should screen the input of other users and the discussions taking place on this platform. Some of the above-mentioned ad hoc reports could be partly based on the discussions on a specific policy challenge in the knowledge bank and would summarise the state of the policy debate on this particular issue, taking into account the literature on this issue.

- **Annual assessments of national reform programmes (NRP) submitted in the context of the Europe 2020 strategy**

Every year, in time for the Commission's preparation of Europe 2020 staff working documents and country-specific recommendations<sup>23</sup>, the network will analyse the contribution of national policies to common objectives as defined in the context of the Europe 2020 strategy and the open method of coordination and the extent to which country-specific recommendations issued previously have been implemented. The national social reports presented in the context of the Social Protection Committee work programme are important sources of information in this respect. Their assessment will have to be done at short notice within five calendar days.

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<sup>23</sup> See <http://ec.europa.eu/europe2020> for details on the processes.

Two assessments will be prepared by each expert:

- One before the presentation of the NRP. Experts will carry out a pre-assessment in the form of a brief overview of the general social context in the country, together with an assessment of the national social targets and bottlenecks which prevent these targets from being reached (within the context of the actions set out in the Annual Growth Survey).
- One after the presentation of the NRP. Experts will carry out a post-assessment evaluating the NRP and re-visiting the conclusions of the pre-assessment.

For enlargement countries, the assessment will relate to relevant national policy documents, including national Employment and Social Reform Programmes (ESRP).

- **Ad hoc requests for providing answers to specific questions and participating in seminars/conferences.**

The independent experts may be called upon to assist the Commission at short notice with information on specific issues or to make presentations at seminars or conferences. For this purpose, the core team and the Commission will agree a request form specifying the precise task, the expert in charge of it, and the time required for executing the tasks. Such requests should not exceed 50 expert days per year in total.

- **Guides describing Member States' social security systems for the general public.**

The role of the core team will consist in supporting the Commission in the preparation, translation and updating of guides describing Member States' social security systems for the general public<sup>24</sup>.

Specifically, the contractor will in year one of the contract coordinate the quality checks by the MISSOC correspondents of the draft guides (up to 20 pages which will be prepared by the Commission in English). After the checks and corrections by the MISSOC correspondents are completed, the contractor will translate the guides into the language of the Member State concerned or, for English-speaking countries, into one other language deemed to be most useful in view of migration patterns.

The bid should allow for the translation of 800 pages per year. In subsequent years, the contractor will coordinate the annual updating of the guides by the MISSOC correspondents and adapt the guides in all available language versions, and prepare further translations into languages that would be most useful in view of migration patterns. The bid should again allow for a total translation volume (updates and new language versions) equivalent to 800 pages. In its offer, the tenderer shall provide a detailed list of prices for the tasks related to translations. The page numbers above are maxima to be budgeted for in the bid. Invoicing shall be on the basis of the price list and the actual number of pages translated.

The above-mentioned guides on national social security systems are and will be available on-line only. The guides should be made available in an open, standardised format (e.g. JSON, XML) that allows them to be automatically retrieved and displayed on other EU websites such as EURES or the Your Europe portal and possibly other external websites, e.g. national administrations. This development may imply working with each of the guide

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<sup>24</sup> Currently, there are 32 guides describing national social security systems, published on DG EMPL website. The guides are in the process of being more adapted to the general public. <http://ec.europa.eu/social/main.jsp?langId=en&catId=858>

and annexes as a separate file, thus managing a substantive number of files (i.e. currently 32 country-specific guides x sections/chapters x language versions which may increase to 34 country-specific guides during the lifetime of the new contract). The standardised format should enable to target a specific part of the guide, and have it rendered by those external websites in their own style (for instance by applying their own CSS). The contractor should design and implement, in close cooperation with the European Commission, a system that will store the guides in this standardised format and offer the tools to manage (update) these guides. This system will also provide the technical services that enable the retrieval of these guides or parts of them by other websites as mentioned above, for instance by accepting web service calls.

All proposed solutions should be in line with IPG and EU copyright as mentioned in section 4.3 of this document.

#### **4.6. Organisational, coordination and dissemination tasks**

The core team will organise a number of meetings and seminars and coordinate the work of the network with the Commission and with other relevant networks:

- **Bi-annual meetings of the MISSOC experts.**

These meetings will be organized jointly with each Presidency of the Council which will host a two-day meeting of the MISSOC government experts.

The costs for travel, accommodation, venue and catering will be borne by the Commission and the Presidency. The contractor's role will be limited to preparation and follow-up of these meetings.

- **Bi-annual seminars of the independent experts and Commission services.**

The core team will organise two 1½-2-day seminars bringing together all the independent experts and Commission officials to discuss specific policy issues as well as working methods and the quality of deliverables.

The contractor will cover the costs of the participation, including working time, travel and accommodation, of secretariat staff and country experts (up to 60 participants, depending on how the contractor can ensure a comprehensive coverage of countries and themes), as well as the costs of the venue and catering. The Commission may open this seminar to staff of several of its departments as well as invite selected stakeholders and policy makers from the countries covered. The travel and accommodation costs arising from such broader attendance will be covered by the Commission and should not be included in the bid, however the bidder should include in the offer the cost of venue and catering for the participants invited by the European Commission. The total number of all participants of the seminar should not exceed 70 persons.

- **Coordination meetings with the Commission.**

The core team will organize three meetings per year with the Commission to steer and monitor the work of the Social Policy Network.

The contractor will prepare the agenda and the minutes of these meetings and submit them for approval to the Commission. The meetings will in particular serve the purpose of



informing the Commission on the implementation of the contract and planning further work.

The last meeting of the year will in particular be devoted to the preparation of the next annual work programme. Ahead of each of these regular meetings with the Commission, the contractor will present records of the allocation and use of the resources of the network and submit reports on the work of the network. The core team will maintain, and update at least every month, a list of tasks and deliverables of the network (core team and experts).

- **Coordination with other relevant networks and organisations.**

The network activities are closely related to the other networks managed by the European Commission such as the mutual learning programme (MLP), the European Employment Policy Observatory (EEPO), and the European Labour Law Network, the Network of Experts in the Field of Gender Equality<sup>25</sup> and the Network of experts on intra-EU mobility<sup>26</sup>.

The core team will liaise (with the support of the Commission) with the other contractors, and will make all necessary arrangements so that their activities are coordinated and synchronised, that the respective networks and users will all be mutually informed of each other's activities, and that synergies are adequately promoted. The core team, together with the European Commission, will ensure coordination of the annual work-programmes of the relevant networks. The core team will also be expected to liaise with experts from relevant International Organizations (OECD, ILO, WB etc) and third countries (e.g. USA, Japan, China, Canada, Australia) who can contribute and enrich the mutual learning process.

The core team will develop tools and a strategy for disseminating those outputs of the network that are not reserved for an exclusive use by the Commission.

As a minimum, this will imply the preparation and mailing of a monthly newsletter (in English) for policy makers, stakeholders and experts. The contractor will manage subscription and mailing solutions. Any personal data collection has to be in-line with current legal obligations<sup>27</sup> on processing personal data by the community institutions and on free movement of such data. The newsletter should contain the flash reports, summaries of ad hoc reports and selected entries from the knowledge bank.

- **Documentation of procedures and informatics tools used by the network.**

The contractor will be expected to document procedures and informatics tools in such a way that the continuity of the Social Policy Network can be ensured by the Commission. This documentation will be delivered to the EC on a regular basis.

At the end of the contract, the contractor will provide the source code of any IT tool developed within the scope of this project and, in the case of databases, the structure of its tables and the entire data content.

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<sup>25</sup> Since 2011 the network of experts in the field of gender equality is managed by DG Justice. Information on the activities of the network are available on EUROPA: [http://ec.europa.eu/justice/gender-equality/tools/experts/index\\_en.htm](http://ec.europa.eu/justice/gender-equality/tools/experts/index_en.htm)

<sup>26</sup> <http://ec.europa.eu/social/main.jsp?catId=625&langId=en&callId=381&furtherCalls=yes>

<sup>27</sup> Currently <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2001:008:0001:0022:EN:PDF>

#### **4.7. Quality assurance**

The core team will be responsible for ensuring the quality of all deliverables. The documents shall be made available electronically on the Network web pages on europa.eu after approval by the Commission. All documents should be made available to the Network experts and Commission officials.

Reports should be clear, accurate and concise, and, as far as possible without losing substance and clarity, be accessible not only to expert readers, but also for a general audience. The layout of any printed or printable documents should follow the guidelines of the European Commission's visual identity. The tenderer should include details on the verification and quality assurance process for all deliverables originating from experts and core team.

Once contracts are signed, the core team should also produce, within the first two weeks, Quality Guidelines to be distributed to all experts, in order to ensure that minimum standards and criteria are respected.

### **5. Language and place of performance**

#### Language

The communication language between the Commission and the contractor shall be English.

All documents referred to in the list of tasks above are to be submitted in English. The comparative tables produced with the government experts (MISSOC), as well as communication with these experts will also be in French and German, in addition to English. The contractor is expected to ensure that all documents are proofread and of high linguistic quality.

#### Place of performance

The tasks will be performed on the contractor's premises, as well as the premises of the experts. Meetings between the contractor and the Commission will be held at the Commission premises. The bi-annual seminar of the independent experts will be held in Brussels at a venue outside Commission premises chosen by the contractor and agreed with the Commission at least two months before the given seminar will take place. The biannual meetings of the government experts will be held in the country holding the Presidency<sup>28</sup>.

#### Change in the team

Changes to the secretariat team and the country experts must be notified to the Commission in writing with a six weeks advance notice. The Commission will have the right to reject the proposed replacements if it has reason to believe that the required quality of work cannot be guaranteed. Should it prove to be impossible to find appropriate replacement team members, the Commission will have the right to terminate the contract.

### **6. Time schedule, reporting and meetings with the Commission**

The contract duration will be twelve months, renewable up to three times.

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<sup>28</sup> See Council Decision of 1 January 2007 determining the order in which the office of President of the Council shall be held (2007/5/EC, Euratom), <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:001:0011:0012:EN:PDF>

The following is an indicative and preliminary timetable for execution of this contract. The dates refer to months starting from the signature of contract, based on the assumption that the contract starts on 1 March 2014, and may need to be adjusted, in particular taking into account the European Semester timeline (for the National Reform Programmes) and the Presidency agenda (for MISSOC meetings). The lowercase letters in brackets refer to the task in the list above.

<b>Date</b>	<b>Task/deliverable</b>
Middle/end of month 1	First meeting with the Commission to plan the work for the year ahead; draft work programme and task list to be presented by contractor (c)
End of month 1	Work programme finalised
End of month 2	First monthly newsletter
Second half of month 2	Assessment of National Reform Programmes <sup>29</sup>
Month 3	First seminar of the independent experts with the Commission
Beginning/middle of month 4	First progress report, second meeting with the Commission
Month 4	Meeting of government experts (MISSOC) in the country holding the Presidency
Month 4	Update of MISSOC tables (reflecting legislation in force on 1/1/2014)
Month 4	Draft of first specific report
Month 5	Country information wiki
Month 5 - 6	First contributions introduced to the Knowledge Bank
Month 7	Second seminar of the independent experts with the Commission
Month 7	Draft of second specific report
Month 8	Knowledge bank fully operational
Month 8	Meeting of government experts (MISSOC) in the country holding the Presidency
End of Month 8	Second progress report, third meeting with the Commission
Month 9	Draft of third specific report
Month 10 - 11	Update of MISSOC tables (reflecting legislation in force on 1/7/2014), update of country information wiki
Month 12	The final report covering the implementation of the contract over the full year and acceptance of third progress report

## **7. Additional requirements**

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.

See in Annex the overview of PROGRESS performance measurement framework.

<sup>29</sup> For enlargement countries, assessment of relevant national policy documents, including ESRPs.

For more information on the strategic framework, please visit the PROGRESS website <http://ec.europa.eu/social/main.jsp?langId=en&catId=327>

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.

## **8. Publication 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 pre-candidate countries.*

For more information see: <http://www.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".

The layout of all products and publications of the Social Policy network should follow the guidelines of the European Commission's visual identity.<sup>30</sup>

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<sup>30</sup> [http://ec.europa.eu/dgs/communication/services/visual\\_identity/index\\_en.htm](http://ec.europa.eu/dgs/communication/services/visual_identity/index_en.htm)

## 9. Prices

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

The price must be stated in EUR (€), net of VAT, using, where appropriate, the conversion rates published in the C series of the Official Journal of the European Union on the day when the invitation to tender was issued.

**The maximum annual budget for the contract is €2 400 000, with up to three renewals. The maximum amount for four years is therefore €9 600 000.**

The total duration of the contract will not exceed four years from when it is first signed.

**Fees**, expressed as the number of person-days multiplied by the unit price per working day for each expert proposed. The unit price should cover the experts' fees and administrative expenditure, but not the reimbursable expenses referred to below (including the days of participation in meetings / seminars).

**Direct costs** include:

- All costs incurred in relation to network activities as specified under section 4
- All administrative, logistical and technical requirements mentioned in section 4;
- Reporting expenses;
- Documentation;
- Development and updating of the subsites on the DG Empl's Website;
- Costs related to quality control and assessment;
- Any unavoidable expenses necessary to the achievement of the contract (contingencies).

The price shall be fixed and not subject to revision during the whole duration of the Contract and its renewal.

## 10. 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 throughout the contract period as a function of the progress made, the tasks undertaken and the quality of the work undertaken.

### 10.1 Interim payments (3 x 20%)

The first interim payment of 20% will be made following receipt and approval by the European Commission of a progress report, in English, detailing the progress and tasks executed to the end of the fourth month following signature of the contract.

The second interim payment of 20% will be made following receipt and approval by the European Commission of a progress report, in English, detailing the progress and tasks executed to the end of the seventh month following signature of the contract.

The third interim payment of 20% will be made following receipt and approval by the European Commission of a progress report, in English, detailing the progress and tasks executed to the end of the tenth month following signature of the contract.

The fourth interim payment of 20% will be made following receipt and approval by the European Commission of a progress report, in English, detailing the progress and tasks executed to the end of the tenth month following signature of the contract.

Requests for interim payments shall be admissible if accompanied by:

- an interim progress report in accordance with the instructions laid down in section 7.2.,
- the relevant invoices provided the report has been approved by the Commission.

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

Within 30 days of the date on which the report is approved by the Commission, an interim payment corresponding to the relevant invoice shall be made.

### 10.3 Payment of the balance

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

- a final technical report in accordance with the instructions laid down in section 7,
- the relevant invoice provided the report has been approved by the Commission.

The Commission shall have 60 days from receipt to approve or reject the report, and the contractor shall have 30 days in which to submit additional information or a new report. Within 30 days of the date on which the final report is approved by the Commission, payment of the balance of the total amount referred to in Article I.3.1 of the draft contract shall be made.

## **11. 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 Union 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.

## **12. Groupings of economic operators or consortia**

Tenders can be submitted by groupings of service providers/suppliers who will not be required to adopt a particular legal form prior to the contract being awarded, but the consortium selected may

be required to assume a given legal form when it has been awarded the contract if this change is necessary for proper performance of the contract<sup>31</sup>. However, a grouping of economic operators must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination. The documents required and listed in the following points 13 and 14 must be supplied by every member of the grouping.

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

### 13. Exclusion criteria and supporting documents

- 1) Bidders must provide a declaration on their honour, duly signed and dated, that they are not in one of the situation referred to in Articles 106 and 107(1) of the Financial Regulation.

Those articles are as follows:

**"Article 106:**

1. *Candidates or tenderers shall be excluded from participation in procurement procedures 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 or persons having powers of representation, decision making or control over them have been convicted of an offence concerning their professional conduct by a judgment of a competent authority of a Member State 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 including by decisions of the EIB and international organisations;*
  - (d) *they are not in compliance with 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 or persons having powers of representation, decision making or control over them have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation, money laundering or any other illegal activity, where such illegal activity is detrimental to the Union's financial interests;*
  - (f) *they are subject to an administrative penalty referred to in Article 109(1).*

(...)

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<sup>31</sup> These entities can take the form of an entity with or without legal personality but offering sufficient protection of the Commission's contractual interests (depending on the Member State concerned, this may be, for example, a consortium or a temporary association). The contract has to be signed by all members of the group, or by one of the members, which has been duly authorised by the other members of the grouping (a power of attorney or sufficient authorisation is to be attached to the contract), when the tenderers have not formed a legal entity.

*Points (b) and (e) of the first subparagraph shall not apply where the candidates or tenderers can demonstrate that adequate measures have been adopted against the persons having powers of representation, decision making or control over them, who are subject to a judgement as referred to in points (b) or (e) of the first subparagraph.*

**Article 107(1):**

1. *A contract shall not be awarded to candidates or tenderers who, during the procurement procedure for that contract:*
  - (a) *are subject to a conflict of interests;*
  - (b) *are guilty of misrepresenting the information required by the contracting authority as a condition of participation in the procurement procedure or fail to supply that 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 143 of Rules of Application, confirming the declaration referred to in point 1 above.

**Article 143 of the Rules of Application – 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 points (a), (b) or (e) of Article 106(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 (a) or (d) of Article 106(1) of the Financial Regulation, a recent certificate issued by the competent authority of the State concerned.*

*Where the document or certificate referred to in paragraph 1 of this Article is not issued in the country concerned and for the other cases of exclusion referred to in Article 106 of the Financial Regulation, 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 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”*.

**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 143 of the Rules of Application, 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.

## **14. Selection criteria**

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

### **14.1. 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 documents should be provided:

- Proof of turnover of the last financial year at least equivalent to 100% of the price of the contract;
- A bank declaration providing evidence of financial standing;
- Full set of financial statements (comprising at least a balance sheet and profit and loss account) for the last two financial years, where the tenderer is required by law to produce such statements. Where the relevant company law requires these financial statements to be audited, the audit's statement should be included. Where the tenderer is not required to produce full financial statements, other documents establishing financial capacity should be submitted (eg internal reports, management accounts, appropriate bankers' statements, evidence of professional risks indemnity insurance etc.).

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.

### **14.2. Technical capacity**

#### **The core team**

- The core team should be led by a Category I expert, as outlined in point 16.1 of the tender specifications. The core team leader should have a proven track record in managing similar activities and the necessary organisational capacity.
- The senior members of the core team should be at least Category II experts.
- The core team leader and senior members of the core team should have sound experience in the field, including in-depth knowledge of social policies in Europe, solid experience in a broad range of social policy issues, including the theoretical and empirical aspects, as well as excellent analytical and drafting capacity;
- The core team should have solid linguistic capability covering at least the three working languages of the Commission (English, German, French) and should ensure that the project contains provision for interpretation, translation and linguistic revision, if this is considered necessary by the contractor to produce clear and linguistically correct documents;

- The core team should also possess the expertise required to put in place or commission the informatics infrastructure needed for the Network and its deliverables.

### **The independent experts**

- Experts should be of level II or higher.
- Each national expert should have a strong experience in the fields of policy analysis in the area of social policies/social inclusion, a good knowledge of the national context(s), and have the ability to work in an international context.
- The experts should have no conflict of interest and should be independent in performing their duties within the Social Policy Network. Each expert proposed must declare that he/she has no conflict of interests. If he/she discovers during the contract period that such a conflict exists, he/she will declare it immediately and will resign from the contract if required by the Commission.

### **In the case of tenders from consortia:**

clear identification of the co-ordinator of the work who will also be responsible for signing the contract, and written confirmation from each member of the consortium that they would be ready and willing to participate in the execution of the contract, and describing their role.

Please note that CVs should not exceed two pages. It is recommended to use the presentation of the Europass CV at:

[http://europass.cedefop.europa.eu/europass/preview.action?locale\\_id=1](http://europass.cedefop.europa.eu/europass/preview.action?locale_id=1)

## **15. Award criteria**

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

**Policy relevance:** The degree of understanding of the nature of the assignment and of its EU policy context (20%).

**Product and process design:** The extent to which the bid assures output of a high quality and of maximum usefulness for the users. This includes notably the proposed structure of outputs and the provision of well-edited and reviewed texts of high quality with good and relevant thematic coverage, and the appropriateness of the proposed organisation, personnel and working methods, in particular the production of timely outputs (40%).

**Coverage and capabilities:** The quality of the project management team and the national experts, and the degree to which the pool of experts proposed for the network will ensure an optimal coverage of the themes and countries involved (40%).

The contract will not be awarded to any bid that receives less than 70% in the award criteria. The points total will be divided by the price, with the highest-scoring bid being chosen.

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

## 16. Content and presentation of bids

### 16.1. Content of bids

They must include all the information required by the Commission, including samples of some of the deliverables listed under 4 (wiki entry, flash report, knowledge bank entry etc.) to enable evaluation of the product design (see point 15).

The bid must include also:

- all information and documents necessary to enable the Commission to appraise the bid on the basis of the exclusion, selection and award criteria (see points 12, 13 and 14 above);
- a bank ID form duly completed and signed by the bank;
- a "legal entity" form duly completed;
- the price (the financial offer must be signed);
- 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;
- the details of the proposed core team and an explanation of the nature and extent of their participation in the project;
- the detailed CVs of the Project Director, the core team's lead expert and all members of the team responsible for providing the service;
- a declaration by the core team leader certifying the competence of the team to carry out the project, including their professional capabilities and language skills;
- a list of principal services or studies provided by the contractor in the relevant policy domain over the past 3 years;
- the detailed CVs of the independent experts;
- the list of experts assigned, classified by level of expertise according following criteria:

<b>Level of qualification I</b>
<i>Highly qualified expert having assumed important responsibilities in his/her profession, recruited for his/her management/supervisory, thought and creativity skills as regards professional practise.</i>
<i>He/she must have at least 15 years professional experience of which at least 7 must be connected with the professional sector concerned and the type of tasks to be performed.</i>
<b>Level of qualification II</b>
<i>Highly qualified expert having assumed responsibilities in his/her profession, recruited for his/her management/supervisory, thought and creativity skills as regards professional practise.</i>
<i>He/she must have at least 10 years professional experience of which at least 4 must be connected with the professional sector concerned and the type of tasks to be performed.</i>
<b>Level of qualification III</b>

<p><i>Certified expert having received a high-level training in his/her profession recruited for his/her thought and creativity skills as regards professional practise.</i></p> <p><i>He/she must have at least 5 years professional experience of which at least 2 must be connected with the professional sector concerned and the type of tasks to be performed</i></p>
<p><b>Level of qualification IV</b></p>
<p><i>Junior expert, newcomer to the profession but holding a university degree or equivalent training related to the professional sector concerned and the type of tasks to be performed.</i></p>

## **16.2. Presentation of bids**

Bids must be submitted in triplicate (i.e. one original, two copies and an electronic copy of the technical part of the bid (CD Rom).

They must be clear and concise.

They must be signed by the legal representative.

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

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

- Print the documents double-sided, where possible;
- Use only 2-hole folders (please do not bind or glue).

**Annex I** Articles 106 & 107 of the Financial Regulation (see point 13 -  
Exclusion Criteria)

**Annex II** Overview of Progress Performance Measurement Framework