

Tender specifications

Open call for tenders No. EEA/BSS/06/009

Building environmental scenarios through participatory methods, facilitating workshops and capacity building

1. Title of contract

Framework contract to assist the European Environment Agency (EEA) in building environmental scenarios through participatory methods, facilitating workshops and capacity building.

2. Purpose and context of the contract

The EEA Strategy 2004-2008 states that activities in the field of ‘scenarios and prospective studies’ aim at (1) developing and analysing a range of scenarios to support the assessment of prospects for Europe’s environment and the consequences of key policy choices, and (2) developing systematic methods to examine plausible future trends for early detection of weak signals, emerging issues and potentially surprising developments. Specific outputs in the upcoming years include:

- development of comprehensive scenarios for Europe’s environment;
- in-depth scenario analysis of key issues;
- elaboration of approaches to stakeholder participation in scenario development and assessments.

3. Subject of the contract

3.1 Objective

The EEA seeks to enter into a framework contract with the purpose of receiving assistance in

- a) Building environmental scenarios through participatory methods,
- b) Facilitating workshops, and
- c) Capacity building in area a) within the EIONET (European Environment Information and Observation Network).

Work in the area of environmental scenarios will require a good knowledge of scenarios building methodologies and a fair understanding of the interplay between the social, economic and environmental areas.

3.1.1 Building environmental scenarios through participatory methods

Two areas of expertise are of particular interest to the EEA:

A. Scenario building exercises and workshops

Since developing environmental scenarios to some extent requires combining qualitative and quantitative information, a good knowledge of scenario methodologies and use of modelling tools is required for undertaking the following activities:

- (i) Developing and drafting narratives or scenario storylines based on the outcomes of both participatory and modelling processes;
- (ii) Reporting outcomes of stakeholder meetings in appropriate formats for further use and communication purposes;
- (iii) Supporting the translation of qualitative information into quantitative information, and vice versa;
- (iv) Scenario analysis.

This activity also includes undertaking:

- (v) Organising scenario workshops in accordance with the methodological approach selected for each specific activities;
- (vi) Background research and relevant scenario interviews in accordance with the specific activity and approach selected.

B. Stakeholder involvement

This includes design of the following processes:

- (i) Consultation;
- (ii) Involvement;
- (iii) Mediation; and
- (iv) Consensus building.

3.1.2 Facilitating workshops

Two areas of expertise are of particular interest to the EEA:

A. General facilitation of meetings

This includes organising events, selecting invitees, leading workshops/ sessions, as well as reporting outcomes of meetings in appropriate formats and planning follow-up activities.

B. Facilitation of participatory workshops to develop scenarios

This includes leading scenarios workshops/sessions in accordance with the methodological approach selected by the EEA, and carrying out the stakeholder participatory appraisal.

3.1.3 Capacity building

Two areas of expertise are of particular interest to the EEA:

A. Communication of results

This includes planning and undertaking communication activities in connection with the development of environmental scenarios, e.g. exploring the use of different multi-media applications.

B. Capacity building activities

This includes support to scenario development capacity building activities that might be undertaken by the EEA within the EIONET (European Environment Information and Observation Network).

3.2 Geographical scope

Most of the EEA activities cover the EEA member countries, with an emphasis on EU policies. Considering the nature of scenarios work, it is expected that information gathering activities will need to go beyond these geographical borders. Furthermore, it could be expected that some of the work undertaken may include a Pan-European perspective covering the 38 members and collaborating countries, and the 12 Eastern Europe, Caucasus and Central Asia (EECCA) countries. For this reason, potential contractors are encouraged to form consortia to broaden the geographical coverage of their expertise. For a list of EEA member and collaborating countries, see:

<http://org.eea.europa.eu/documents/MemberstatesMap>

3.3 Qualifications

The tenderer should provide evidence of the following qualifications:

- Knowledge of and experience in scenario building methodologies, scenario analysis and the combination of qualitative and quantitative information;
- Experience in developing and drafting narratives or scenario storylines based on the outcomes of both participatory and modelling processes;
- Experience in translating qualitative information into quantitative information and vice versa;
- Experience in communication and capacity building activities;

- Experience in organising scenario building workshops and meetings involving people from several countries;
- Well-defined project and consortium management procedures which ensure smooth running of specific activities. Documentation of previous experience in collaboration is an asset, but not a requirement;
- Documented excellent English writing skills;
- Documented ability to work in several EU languages either via multilingual staff or via consortium partners in several countries. It is a requirement that all consortium partners can work in English as this is the main working language of the EEA;

3.4 Place of performance

The analytical part of the work will mainly be performed from the contractor's premises, whereas the facilitation and stakeholder processes are likely to take place at the EEA. Any travel undertaken under the contract must be based on the EEA's rules, as per Annex 3 attached (Reimbursement of Travel Expenses).

3.5 Duration of contract

The framework contract will be awarded for a period of two years, renewable twice for a period of one year, its maximum duration being restricted to four years. On the basis of this framework contract, specific contracts will be issued detailing the subject, duration, price and implementing conditions.

3.6 Working language

The working language is English, and deliverables under specific contracts shall be provided in English, unless otherwise agreed.

4. Documentation for tenderers

Information on recent EEA activities in the field of scenarios and forward studies can be accessed at the following web pages:

- PRELUDE (PRospective Environmental analysis of Land Use Development in Europe) project:

<http://www.eea.europa.eu/Highlights/20050909134321>
<http://scenarios.ewindows.eu.org/reports/fo1077184>

- European Environment Outlook report:

http://reports.eea.europa.eu/eea_report_2005_4/en/
<http://scenarios.ewindows.eu.org/reports/fo1949029>

<http://dataservice.eea.europa.eu/atlas/available2.asp?type=findtheme&theme=scenarios>

<http://dataservice.eea.europa.eu/dataservice/available2.asp?type=findtheme&theme=scenarios>

- The European environment - State and outlook 2005 report:

<http://www.eea.europa.eu/Highlights/20051122115248>

- Household consumption and the environment report:

http://reports.eea.europa.eu/eea_report_2005_11/en

5. Volume of the contract

The estimated yearly budget is EUR 100 000, but this figure may vary depending on the needs of the EEA.

6. Price

The tenderer should indicate the daily fees for a senior expert and for a junior expert, respectively. Prices must be quoted in euros, including for countries that are not part of the euro zone. For tenderers in countries that do not belong to the euro zone, the price quoted may not be revised in line with exchange rate movements. It is for the tenderer to select an exchange rate and assume the risks or the benefits deriving from any variation.

The price quoted must be fixed and not subject to revision during the first year of duration of the framework contract.

From the beginning of the second year of duration of the contract, prices may be revised upwards or downwards each year, where such revision is requested by one of the contracting parties by registered letter no later than three months before the anniversary of the date on which it was signed. The EEA shall purchase on the basis of the prices in force on the date on which specific contracts are signed. Such prices shall not be subject to revision.

This revision shall be determined by the trend in the harmonised consumer price index published by the European Commission on Eurostat web page (Theme 2 - Economy and Finance; Prices; HICP – Harmonized Indices of Consumer Prices; HMIDX – Monthly data (index); GEO – Eurozone; COICOP cp00).

Revision shall be calculated in accordance with the following formula:

$$Pr = Po \left(0,2 + 0,8 \frac{Ir}{Io} \right)$$

where:

Pr = revised price;

Po = price in the original tender;

- Io = index for the month in which the validity of the tender expires;
Ir = index for the month corresponding to the date of receipt of the letter requesting a revision of prices

Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities and the Headquarters Agreement between the Agency and the Government of Denmark of 17 August 1995, the Agency is exempt from all charges, taxes and dues, including value added tax; such charges may not therefore be included in the calculation of the price quoted; the VAT amount must be indicated separately.

The costs incurred in preparing and submitting tenders are borne by the tenderer and cannot be reimbursed.

7. Contractual terms

In drawing up their bid, the tenderers should bear in mind the provisions of the standard contract attached to this invitation to tender.

8. Criteria

Exclusion criteria

Tenderers shall be excluded from participation in a procurement procedure 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 judgment 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 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 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) they have been convicted of an environmental offence in the exercise of their profession;

(g) 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.

Tenderers must certify that they are not in one of the situations listed above. The tenderer shall provide an auto-declaration, preferably made on oath before a judicial or administrative authority, a notary or a competent professional or trade body by a person competent to do so on behalf of the tenderer, which states that none of the grounds for exclusion apply to the tenderer (See Annex 1).

Potential contractors may be requested, at a later stage, to certify that they are not in one of the situations listed above by providing:

i) For points (a), (b) and (e) 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 those requirements are satisfied, must be provided;

ii) For point (d) a recent certificate issued by the competent authority of the State concerned must be provided. Where no such 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.

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

(a) are subject to a conflict of interest;

(b) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

Selection criteria

Legal Capacity

Any tenderer will be asked to prove that he is authorised to perform the contract under national law, as evidenced by inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, express authorisation, or entry in the VAT register.

The tenderer should provide an identification sheet (Annex 2) duly filled out and signed, a copy of inscription in a trade register, where applicable, and a copy of inscription in VAT registers.

Economic and Financial capacity

Proof of economic and financial capacity may be furnished by one or more of the following documents:

- (a) appropriate statements from banks or evidence of professional risk indemnity insurance;
- (b) the presentation of balance sheets or extracts from balance sheets for at least the last two years for which accounts have been closed, where publication of the balance sheet is required under the company law of the country in which the economic operator is established;
- (c) a statement of overall turnover and turnover concerning the works, supplies or services covered by the contract during a period which may be no more than the last three financial years.

If, for some exceptional reason, which the contracting authority considers justified, the tenderer 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.

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links, which it has with them. It must in that case prove to the contracting authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

Technical and professional capacity

Evidence of technical and professional capacity should be furnished on the basis of the following documents:

- (a) the educational and professional qualifications of the tenderer and/or those of the firm's managerial staff and, in particular, those of the person or persons responsible for providing the services (CVs of the proposed staff);
- (b) a list of principal services provided in the past three years, with sums, dates and recipients, public or private;
- (c) a description of the measures employed to ensure the quality of supplies and services, and a description of the firm's study and research facilities;
- (d) an indication of the proportion of the contract which the service provider may intend to subcontract.

Award criteria

The contract will be awarded to the tenderer whose offer is the economically most advantageous taking into account quality and price.

Regarding quality, a minimum of 50% under criteria 1-8 and a total minimum of 70 points should be achieved under the following criteria (with the weighing given in the last column):

No	Field of experience	Points
1	Knowledge of and experience in scenario building methodologies, scenario analysis and the combination of qualitative and quantitative information;	20
2	Experience in developing and drafting narratives or scenario storylines based on the outcomes of both participatory and modelling processes;	15
3	Experience in translating qualitative information into quantitative information and vice versa	10
4	Experience in communication and capacity building activities;	10
5	Experience in organising scenario building workshops and meetings involving people from several countries.	10
6	Well defined project and consortium management procedures which ensure smooth running of specific activities. Documentation of previous experience in collaboration is an asset, but not a requirement.	10
7	Documented excellent English writing skills.	5
8	Documented ability to work in several EU languages either via multilingual staff or via consortium partners in several countries. It is a requirement that all consortium partners can work in English as this is the main working language of the EEA.	5
9	Well defined internal environmental management procedures	5
10	Price The points will be awarded using the following formula: (lowest average fee/average fee of the tender being considered) x 10 The average fee is calculated as: (fee Project leader + fee Senior consultant + fee Junior consultant + fee Assistant)/4	10

For each of the first eight fields of experience listed in the table above, the tenderer must describe the level of expertise, including the following information:

- Understanding of the field of experience;
- Methodological approach and quality assurance processes;
- List of relevant services provided;
- List of people contributing.

9. Tenders

The tender must comprise:

- a technical offer containing a description of expertise and approach to be used in the work for the EEA;
- a financial offer containing the daily rates for the following categories of project staff (listed for all companies in the case of a consortium):

Project leader (PL)	Person with a solid overview of the different fields of work as well as management responsibility
Senior consultant (SC)	Highly experienced consultant/analyst
Junior consultant (JC)	Less experienced consultant/analyst
Assistant (A)	Support staff, e.g. data assistants

- declaration on Exclusion criteria;
- documents proving legal status;
- documents proving financial and technical capacity;
- if the tenderer intends to subcontract part of the work, an indication of the proportion of the contract intended to be subcontracted must be included in the tender;
- tenders from consortia of firms or groups of service providers must specify the role, qualifications and experience of each of the members of the consortium. Declarations on exclusion and documents on selection criteria must be supplied by each member of the consortium or group of service providers submitting a single tender, as well as a letter of intent to form a consortium;
- tenders should preferably be drafted in English.

10. Environmental considerations

The EEA runs a certified environmental management system (EMAS) and aims to minimise the environmental impact of all its activities, including those carried out under contract. The successful tenderer will, therefore, be requested to consider the EEA environmental management guidelines in their work, in particular those relating to business travel, paper and energy consumption. Further information on the EMAS system can be found on the EEA homepage:
<http://org.eea.europa.eu/documents/emas>

Moreover, we strongly recommend the tenderers to submit the tenders in an environmentally friendly way, as follows:

- enclosing only material mentioned in the technical specifications (no additional material);
- printed on both sides of paper;
- without plastic folders or binders;
- with consecutive page numbering and with a list of contents.