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B-Brussels: study on the relevance and the effectiveness of ERDF and Cohesion Fund support to regions with specific geographical features — islands, mountainous and sparsely populated areas

2010/S 147-226441

Contract notice

Section I: Contracting authority

I.1) Name, addresses and contact point(s):

European Commission, Directorate-General for Regional Policy, REGIO.C., attention: Mrs Kazlauskienė, Director, CSM1 4/123, 1049Brussels, BELGIUM. Tel. +32 22951685. Fax +32 22921232. E-mail: Regio-Directeur-C@ec.europa.eu

Internet address(es):

General address of the contracting authority: http://ec.europa.eu/regional_policy/tender/tender_en.htm

Further information can be obtained at:

As in abovementioned contact point(s).

Specifications and additional documents (including documents for competitive dialogue and a dynamic purchasing system) can be obtained at:

As in abovementioned contact point(s).

Tenders or requests to participate must be sent to:

As in abovementioned contact point(s).

I.2) Type of the contracting authority and main activity or activities:

European institution/agency or international organisation.

General public services.

The contracting authority is purchasing on behalf of other contracting authorities: no.

Section II: Object of the contract

II.1) Description

II.1.1) Title attributed to the contract by the contracting authority:

Study on the relevance and the effectiveness of ERDF and Cohesion Fund support to regions with specific geographical features — islands, mountainous and sparsely populated areas.

II.1.2) Type of contract and location of works, place of delivery or of performance:

Services.

Service category No 11.

Main place of performance: off Commission premises.

II.1.3) The notice involves:

A public contract.

II.1.5) Short description of the contract or purchase(s):

The objective of this study is to examine the extent to which cohesion policy interventions are and have been appropriate in islands and mountainous and sparsely-populated regions. The second objective is to explore policy and governance approaches and identify good practices in implementing 'territorial cohesion' on the ground in the case of islands, mountainous and sparsely-populated regions.

The study covers convergence and regional competitiveness and employment objectives (2000–2006 and 2007–2013) focusing particularly on 30 selected regions receiving support from the European Regional Development Fund (ERDF) or the Cohesion Fund. The regional level of analysis will be NUTS 3 and NUTS 2 level. A tentative list of NUTS 3 regions belonging to the categories of islands, mountainous and/or sparsely-populated is annexed to the invitation to tender.

The study does not cover the outermost regions because of their special legal status and extreme remoteness/isolation. Previous studies suggest that in most cases the differences between outermost regions and other islands are so important statistically, that these territories must be considered in a separate analysis. Cyprus and Malta are also excluded from the analysis, being island States.

II.1.6) **Common procurement vocabulary (CPV):**

79000000, 79411000.

II.1.7) **Contract covered by the Government Procurement Agreement (GPA):**

Yes.

II.1.8) **Division into lots:**

No.

II.1.9) **Variants will be accepted:**

No.

II.2) **Quantity or scope of the contract**

II.2.1) **Total quantity or scope:**

250 000 EUR maximum (lump sum, including fees, travel expenses and other costs).
Estimated value excluding VAT: 250 000 EUR.

II.2.2) **Options:**

No.

II.3) **Duration of the contract or time limit for completion:**

Duration in months: 12 (from the award of the contract).

Section III: Legal, economic, financial and technical information

III.1) **Conditions relating to the contract**

III.1.2) **Main financing conditions and payment arrangements and/or reference to the relevant provisions regulating them:**

The contractor shall submit requests for all payment, expressed in euro, to the Commission.

Payments under the contract shall be made as follows:

a 1st interim payment equal to 30 % of the total amount within 30 days of the date on which a valid request for payment is registered following approval by the Commission of the inception report;

a 2nd interim payment equal to 40 % of the total amount within 30 days of the date on which a valid request for payment is registered following approval by the Commission of the 2nd intermediate report;

payment of the balance equal to 30 % of the total amount within 30 days of the date on which a valid request for payment is registered following approval by the Commission of the final report and the previous deliverables, and the organisation of the report's presentations.

III.1.3) **Legal form to be taken by the grouping of economic operators to whom the contract is to be awarded:**

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 may be required to do so after the award. However, a grouping of firms must nominate 1 party to be responsible for the receipt and processing of payment for members of the grouping, for managing the service administration and for the coordination. The documents

required in the following paragraph III.2 must be supplied by every member of the grouping. Each member of the grouping assumes joint and several liabilities towards the Commission.

III.1.4) **Other particular conditions to which the performance of the contract is subject:**

No.

III.2) **Conditions for participation**

III.2.1) **Personal situation of economic operators, including requirements relating to enrolment on professional or trade registers:**

Information and formalities necessary for evaluating if requirements are met:

Exclusion criteria:

A. Exclusion from participation in the procedure:

Tenderers are excluded from participating in a 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 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 authorities can justify;

(d) they have not fulfilled their obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established, or with those of the country of the contracting authority or those of the country where the contract is to be carried out;

(e) they have been the subject of a judgement which has the force of 'res judicata' for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the European Union's financial interests;

(f) they have, following another procurement procedure or grant award procedure financed by the European Union's budget, been declared to be in serious breach of contract for failure to comply with their contractual obligations.

Evidence:

1. Tenderers shall provide a declaration on their honour, duly signed and dated, stating that they are not in one of the situations described above.

2. The tenderer to whom the contract is to be awarded shall provide, within 10 days preceding the signature of the contract, the evidence referred to in the following paragraphs, confirming the declaration referred to in the previous paragraph.

3. The contracting authority will accept, as satisfactory evidence that the tenderer to whom the contract is to be awarded is not in one of the situations described in points (a), (b) or (e), an extract from the judicial record or, failing that, an equivalent document issued by a judicial or administrative authority in the country of origin or provenance, showing that those requirements are satisfied.

The contracting authority will accept, as satisfactory evidence that the tenderer is not in one of the situations described in point (d), a certificate issued by the competent authority of the Member State concerned.

Where no such document or certificate is issued by the country concerned and for other cases of exclusion referred to in cases (c) and (f) above, 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 or her country of origin or provenance.

These documents or certificates must be valid on the closing date for receipt of tenders, and in any case, they must have been delivered less than 12 months before this closing date.

Depending on the national legislation of the country in which the tenderer is established, the documents referred to in points 1 and 3 above must relate to legal persons and 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 tenderer.

B. Exclusion from award of the contract:

No contract will be awarded to tenderers who, at the time when contracts are being awarded under this procedure:

(a) have a conflict of interest. The Commission must ensure that the tenderer does not, at the time of submitting a tender, have any conflict of interest in connection with this call for tenders, a conflict of interest possibly arising in particular as a result of economic interests, political or national affinities, family or emotional ties, or any other relevant connection or shared interest. The Commission reserves the right to assess whether a conflict of interest exists.

To that end tenderers are asked to state whether their payroll, staff or shareholders include:

- any former European officials, contract staff, temporary staff or auxiliary staff who have worked for the European Union in the 3 years preceding this call for tenders,
- any European officials on leave,
- any former agents on secondment within the European institutions having worked for the European Union during the 3 years preceding this call for tender,
- any former trainees who have completed a placement at the EU during the year preceding this call for tenders.

Tenderers are also asked to declare:

- that they have not made and will not make any offer of any type whatsoever from which an advantage can be derived under the contract,
 - that they have not granted and will not grant, have not sought and will not seek, have not attempted and will not attempt to obtain, and have not accepted and will not accept, any advantage, financial or in kind, to or from any party whatsoever, constituting an illegal practice or involving corruption, either directly or indirectly, as an incentive or reward relating to the award of the contract,
 - that they will inform the contracting authority, without delay, of any situation constituting a conflict of interest or which could give rise to a conflict of interest;
- (b) have been guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or have failed to supply that information.

Evidence:

The contracting authority will accept, as satisfactory evidence that the tenderer is not in one of the situations described in points B(a) and (b), a declaration on their honour signed by the tenderer. However, the Commission reserves the right to verify the information.

C. Tenders submitted by consortia or groups of service providers — tenders involving subcontracting.

Where the tender is submitted by a consortium or by a contractor intending to subcontract part of the work or have it performed by another economic operator, the exclusion criteria defined above have to be fulfilled by each economic operator involved in the tender.

Evidence:

In the case of tenders submitted by consortia or groups of service providers, every economic operator in the tender must provide a declaration on honour to prove that none of the exclusion criteria for participation or award of contracts applies to it.

The tenderer to whom the contract is to be awarded shall provide, within 10 days preceding the signature of the contract, the evidence referred to above, confirming the declaration on honour for every economic operator part of the consortia or groups of service providers.

In the case of tenders involving subcontracting, the tenderer to whom the contract is to be awarded shall provide, within 10 days preceding the signature of the contract, the evidence referred to above for the exclusion criteria for participation or award of contracts, confirming the declaration on honour for every subcontractor for which the Commission will request it.

Selection criteria:

Legal position — means of proof required:

(a) where the tenderer needs a specific authorisation or must be a member of a specific organisation in order to provide the services concerned in his country of origin, he must prove that he holds this authorisation or that he belongs to this organisation;

(b) the tenderer is required to furnish proof of his enrolment on the professional or trade register, or a sworn statement or certificate in accordance with the conditions laid down in the Member State in which he is established.

III.2.2) **Economic and financial capacity:**

Information and formalities necessary for evaluating if requirements are met:

The tenderers must prove that they have the economic and financial capacity to carry out the tasks set out in the tender specifications throughout the duration of the contract.

Proof of financial and economic standing must be provided by one or more of the following:

- bank declarations,
- balance sheets or summarised balance sheets,
- a statement of general turnover or turnover relating to the services in question, covering the last 3 financial years.

III.2.3) **Technical capacity:**

Information and formalities necessary for evaluating if requirements are met:

Technical capacity will be assessed on the basis of expertise, knowledge, efficiency, experience and reliability in the following areas:

- the theory and practice of socioeconomic analysis and evaluation,
- knowledge of fundamental features of cohesion policy,
- the drafting and presentation of analytical reports,
- the manipulation and analysis of data,
- capacity to deliver texts of good quality in English.

Proof of the above may be furnished by means of:

- (i) the educational and professional qualifications of the service provider or contractor and/or those of the firm's managerial staff and, in particular, those of the person or persons responsible for providing the services;
- (ii) main services provided over the past 3 years, together with details of values, dates and public or private recipients involved;
- (iii) tenderer's average annual manpower and number of managerial staff over the past 3 years;
- (iv) technical plant and equipment, office-automation and computer equipment available to the tenderer for performing the services;
- (v) company's study and research facilities;
- (vi) proportion of the contract which the tenderer may intend to subcontract.

III.2.4) **Reserved contracts:**

No.

III.3) **Conditions specific to services contracts**

III.3.1) **Execution of the service is reserved to a particular profession:**

No.

III.3.2) **Legal entities should indicate the names and professional qualifications of the staff responsible for the execution of the service:**

Yes.

Section IV: Procedure

IV.1) **Type of procedure**

IV.1.1) **Type of procedure:**

Open.

IV.2) **Award criteria**

IV.2.1) **Award criteria:**

The most economically advantageous tender in terms of the criteria stated in the specifications, in the invitation to tender or to negotiate or in the descriptive document.

IV.2.2) **An electronic auction will be used:**

No.

IV.3) **Administrative information**

IV.3.1) **File reference number attributed by the contracting authority:**

2010.CE.16.0.AT.059.

IV.3.2) **Previous publication(s) concerning the same contract:**

No.

IV.3.3) **Conditions for obtaining specifications and additional documents or descriptive document:**

Payable documents: no.

IV.3.4) **Time limit for receipt of tenders or requests to participate:**

14.9.2010.

IV.3.6) **Language(s) in which tenders or requests to participate may be drawn up:**

Bulgarian, Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Greek, Hungarian, Irish, Italian, Latvian, Lithuanian, Maltese, Polish, Portuguese, Romanian, Slovak, Slovenian, Spanish and Swedish.

IV.3.7) **Minimum time frame during which the tenderer must maintain the tender:**

Duration in months: 6 (from the date stated for receipt of tender).

IV.3.8) **Conditions for opening tenders:**

Date: 21.9.2010 (14:00).

Place: CSM1 09/20, Regional Policy DG, rue Père de Deken 23, 1040 Brussels, BELGIUM.

Persons authorised to be present at the opening of tenders: yes.

Each tenderer may take part or send a representative.

Section VI: Complementary information

VI.1) **This is a recurrent procurement:**

No.

VI.2) **Contract related to a project and/or programme financed by EU funds:**

No.

VI.3) **Additional information:**

As tendering documents and any additional information are available on the website of Directorate-General for Regional Policy at the following address: http://ec.europa.eu/regional_policy/tender/tender_en.htm potential tenderers are requested to regularly verify the Internet website.

VI.4) **Procedures for appeal**

VI.4.1) **Body responsible for appeal procedures:**

General Court, rue du Fort Niedergrünwald, 2925 Luxembourg, LUXEMBOURG. Tel. +352 4303-1. Fax +352 4303-2100. Internet: <http://curia.europa.eu>

VI.4.2) **Lodging of appeals:**

Precise information on deadline(s) for lodging appeals:

Within 2 months of the notification to the plaintiff, or, in absence thereof, of the day on which it came to the knowledge. A complaint to the European Ombudsman does not have as an effect either to suspend this period or to open a new period for lodging appeals.

VI.5) **Date of dispatch of this notice:**

20.7.2010.