

SPECIFIC TERMS OF REFERENCE

FWC Commission 2007 – Lot n° 1

REQUEST FOR SERVICES N° 2010/242430

1. BACKGROUND

In 2006, the European Commission and some EU Member States launched the initiative "Mobilising European Research for Development Policies" which aims at enhancing the European vision on development and its influence in the international development agenda. This initiative stems from the *European Consensus on Development* and from the '*Aid Effectiveness package*' of April 2006 which highlight the need to enhance analytical capacity in support of the EU's global role and policies at international level, to strengthening the linkages between the research community and policy makers by stimulating the public debate on development policy in Europe. The objective of the initiative is to enhance a European perspective on development issues in the international arena, on the basis of knowledge excellence, innovation and building of common ground between the European research community and policy-makers (Member States and European Commission). Moreover, this initiative will improve the visibility of the EU at a global level, help shape the international agenda and feed the EU internal debate on development.

The *European Report on Development (ERD)*, drawing from economics, political and social sciences, is the main tangible output of the initiative and a counterpart to the major international global reports on development issues.

The ERD, together with other intermediary products, will play a catalytic role in raising debate, building on established networks and refining the common vision sketched in the European Consensus on Development.

The ERD is issued on annual basis.

The first ERD "Overcoming Fragility in Africa – Forging a new European Approach" was released on 21st October 2009 at the European Development Days in Stockholm.

The ERD 2010 is under preparation and will build on the same research and financial "architecture" as the ERD 2009. The ERD 2010 topic as agreed by the Steering Committee will deal with poverty, inequality and social protection, with a specific focus on Sub-Saharan Africa. As far as the organization of the project is concerned, a writing and editorial team will be responsible for the content, overall quality, coherence and timeliness of the report as well as for the other related activities (research studies, workshops and conferences). Multi-disciplinary and multi-national, the ERD Team will be responsible for drafting the report and carrying out the tasks leading to it.

More information on the ERD 2009 and 2010 process is available on <http://erd.eui.eu/>

Building on the outcome of previous consultations with researchers and policy-makers, the ERD Steering Committee has agreed that the key orientations for the multi-year story line of the report will look at key drivers for change and challenges which are likely to affect

the development agenda. The multi-year story line will focus on ""Up to 2020: adapting development to new challenges – the EU's approach".

This general theme covers three pillars:

- (1) *The new global context*: The world is currently undertaking important changes which have strong implications for development policy. New players are gaining relevance not only as economic actors but also on the international political scene and as emerging donors, all this implying a shift in balance of powers. Global economic instability, highlighted by the recent "food – oil – financial" shocks and the current economic slowdown, raises fundamental questions on the way globalization is managed and could lead to structural reforms with long lasting impacts regarding the international governance architecture. Competition over scarcer natural resources (energy and non-energy), a significant part of which are located in developing countries, is increasing between confirmed and emerging economic powers. The trend toward greater diffusion of authority and power that has been occurring for a couple of decades seems likely to accelerate, possibly generating a worsening in the institutional deficit, a potential expansion of regional blocs, and an enhanced strength of non-state actors and networks. Global warming is increasingly high on the international policy agenda and generates significant challenges from a development perspective.
- (2) *The European flavour* - The EU approach is based on values, norms and interests (human rights, social inclusion, multilateralism, respect for diversity) – Europe's experiences as a governance system, gathering countries at different stages of development - poverty eradication does not only mean economic growth but also political and social aspects (democracy, inequality, well-being);
- (3) *What will be Europe's role in this new global context*, taking into account the new challenges and opportunities including those brought by the Lisbon Treaty?

Building on those three pillars, the ERD will address one specific theme every year.

The European Commission (DG Development) and the Member States contributing to the initiative launched an open service tender – Reference: *T/DEV/ERD/2010/001 – Contract Notice published in OJ– Reference No. S 109/164443 of 8 June 2010* – for the selection of the economic operator in charge for the conception, drafting and editing of the ERD 2011, including the undertaking of some activities of research and consultation.

2. DESCRIPTION OF THE ASSIGNMENT

➤ Objective

Assisting the members of the Evaluation Committee in their evaluation of the tenders received in response to the call for tenders Reference: *T/DEV/ERD/2010/001 – Contract Notice published in OJ– Reference No S 109/164443 of 8 June 2010* –.

➤ Requested services, including their implementation modalities when relevant:

- Assist the Evaluation Committee in its evaluation of the offers submitted under the call for tenders. The Evaluation Committee will be composed of representatives of the

Member States participating in the initiative and representatives of the Commission (DG Development).

- Verify the conformity of the offers received versus the tender's specifications published, including the verification of the exclusion, selection and awarding criteria

To do so, the expert will:

- Carry out a thorough analysis of these offers;
- Analyse the technical compliance and quality of the bids received: identify strengths and weaknesses;
- Reply to all the technical questions the evaluators may submit (orally and/or in writing) to his attention;
- Submit her/his recommendations on these analyses and consolidated report on the technical questions raised by the Evaluation Committee prior to the Evaluation Committee's first meeting on the technical evaluation of the offers;
- Attend the Evaluation Committee's first meeting on the technical evaluation of the offers as observer;
- Draft clarification requests to the tenderers further to the Evaluation Committee's meeting (if relevant);
- Consolidate the clarifications received by the tenderers into her/his final technical analyses of the offers.

➤ **Required outputs**

- Conclusions/recommendations on the analyses of the offers (draft and final)
- Consolidated report on questions raised by the Evaluation Committee during the evaluation of the offers

3. EXPERTS PROFILE

➤ **Qualifications and skills**

- Academic background in economics, social or political sciences;
- Excellent knowledge about European development policies.
- Minimum 15 years of relevant professional experience in socio-economic projects in international development.

In particular the experts shall present:

- Knowledge of EC rules, and previous experience of procedures and formats, especially in tender documents preparation and technical evaluation of offers;
- Fluency (written & spoken) in English.

➤ **Number of requested experts per category and number of man-days per expert:**

One Category I Expert will be appointed for up to a maximum of 15 man-days (including travel to/from Brussels).

Notes:

The expert must be independent and free from conflicts of interest in the responsibilities accorded to him/her. The expert shall be required to sign a Declaration of Impartiality and Confidentiality.

All information provided under this contract shall be treated as **strictly confidential** by both the expert and the consultant.

➤ **Working language(s)**

The working language will be English.

4. LOCATION AND DURATION

➤ ***Starting period***

Indicatively 6 September 2010 but not prior to contract signature.

➤ ***Foreseen finishing period or duration***

Indicatively October 2010

➤ ***Planning***

One Category I expert for up to maximum of **fifteen** (15) working days (depending on the number of bids received) broken down as follows:

Timing	Working days	Tasks
6 September 2010	1	Travel
7 September 2010 - morning	0.5	Briefing in DG Development
7 September afternoon until 15 September 2010	6.5	- Thorough analysis of the bids received under the call for tenders; - Answering any technical queries raised by the Evaluation Committee.
16 September 2010	1	Draft conclusions on analyses of the bids and consolidated report on the technical questions raised by the Evaluation Committee
17 September 2010	1	Participating as Observer to the Evaluation Committee's meeting.
20 September 2010	1	Drafting requests for clarifications to tenderers (if relevant)
21 September 2010	1	Finalising all deliverables
22 September 2010	1	Travel
Mid-October	2	(if applicable) Assisting the Evaluation Committee in answering to complaints/appeals as for technical issues raised by the tenderers not succeeding the award procedure

➤ ***Location(s) of assignment***

Premises of the European Commission – DG Development - Brussels

5. REPORTING

Submission timing: see Point 4

Paper and E-copies of the expert' draft conclusions on the evaluation of the offers will be submitted to the Evaluation Committee on half a day before the Evaluation Committee's first meeting on the evaluation of the offers.

The final report will consist of the expert's conclusions/recommendations on the analysis of the offers, and a comprehensive and extended list of the questions and answers raised during the evaluation exercise.

In case of complaints/appeals, should the expert assist the Evaluation Committee after the award procedure, a report on the questions and answers raised in this context should also be drafted by the expert.

➤ ***Content:***

- Detailed analysis of the offers: identification of strengths and weaknesses
- List of questions raised by the Evaluation Committee, and the expert's answers
- Consolidated and final detailed analysis of the offers, Q&A on the offers, list of clarification requests to the tenderers and their answers.

➤ ***Language***

Reporting language is English.

➤ ***Timing for submission and comments and, when relevant, for approval:***

- Timing for submission of the deliverables: see Point 4.
- Approval by the Commission services of the deliverables: 10 working days after submission.

➤ ***Number of report(s) copies***

- All deliverables to be submitted in electronic version to DG Development – Unit A1.
- Final consolidated report on analysis of the offers and Q&A to Evaluation Committee: E-copy + three (3) paper copies.

6. ADMINISTRATIVE INFORMATION

The study will be commissioned and managed by the European Commission's Directorate General for Development, Units DGA.A1- "Forward looking studies and policy coherence" and DGA.01 "Resources".

➤ ***Estimated budget:*** maximum € 20.000

➤ ***Items to foresee under 'Reimbursable':***

- Per diems in Brussels: up to maximum 16 (including week-ends, max. per diem rate: € 232)

- One return ticket from the expert's place of residence to Brussels (economy class). An additional return ticket from the expert's place of residence to Brussels shall be reimbursed in case the Evaluation Committee would require assistance after the award procedure (complaints/appeals).
- Contingencies

➤ **Others:**

This contract will be concluded provided that the number of bids received from the ERD Tender is minimum two (2).