



OPEN CALL FOR TENDERS

Reference N° EACEA/2008/07

"CALL FOR TENDER FOR CARRYING OUT A STUDY ON VOLUNTEERING IN THE EU"

TENDER SPECIFICATIONS

1.	INTRODUCTION.....	5
1.1.	General information.....	5
1.2.	Management of the call for tenders	5
1.3.	Duration of the contract	5
2.	GENERAL TERMS AND CONDITIONS APPLICABLE TO CALLS FOR TENDER	6
2.1.	Tenders	6
2.2.	Payment.....	8
2.3.	Financial Guarantee.....	8
2.4.	Penalties.....	8
2.5.	Period of validity of tenders	9
2.6.	Price	9
2.7.	Conflict of interests	9
2.8.	Joint tenders.....	10
2.9.	Subcontractors.....	10
2.10.	Contact point.....	10
3.	TECHNICAL SPECIFICATIONS.....	11
3.1.	Introduction	11
3.2.	Context of the contract	11
	3.2.1. <i>International level</i>	11
	3.2.2. <i>EU level</i>	11
	3.2.3 <i>National perspective</i>	13
	3.2.4. <i>Non-governmental stakeholders / Civil Society organisations</i>	13
3.3.	Purpose of the contract – Specific objectives, field of application.....	16
	3.3.1. <i>General objective</i>	16
	3.3.2. <i>Specific objectives</i>	16
3.4.	Services	17
	3.4.1. <i>Geographical area to be covered</i>	17
	3.4.2. <i>Existing material</i>	17
	3.4.3. <i>Research / surveys involving governmental and non-governmental stakeholders</i>	17
3.5.	Requirements	18
	3.5.1. <i>Taking into account existing research and addressing remaining gaps</i>	18

3.5.2.	<i>Consistency with EU strategies and priorities</i>	18
3.5.3.	<i>Consistency with the concept of Active European Citizenship and the aims of the Europe for Citizens programme</i>	18
3.5.4.	<i>Consistency with the White Paper on Sport</i>	19
3.6.	Methodological remarks	19
3.6.1.	<i>Workplace</i>	19
3.6.2.	<i>Schedule</i>	20
3.7	Outputs and results	20
3.7.1	<i>Descriptive part: state of play in the Member States</i>	20
3.7.2.	<i>Analysis of the findings: issues, trends, challenges</i>	23
3.7.3.	<i>Recommendations on how to address the identified challenges and issues at EU level:</i>	23
3.8.	Reports	24
3.8.1.	<i>Drafting and transmission of reports</i>	24
3.8.2.	<i>Intermediate report</i>	24
3.8.3.	<i>Final report</i>	24
3.9	Budget	24
4.	EVALUATION AND AWARD OF THE CONTRACT	25
4.1.	Exclusion of tenderers	25
4.2.	Selection of tenderers	26
4.2.1.	<i>Professional capacity</i>	26
4.2.2	<i>Economic and financial capacity</i>	26
4.2.3	<i>Technical capacity</i>	27
4.3.	Evaluation of tenders	28
4.3.1	<i>Technical evaluation</i>	28
4.3.2.	<i>Financial evaluation</i>	28
4.4.	Award of the contract	29
5.	GENERAL CONDITIONS FOR THE AWARD OF CONTRACTS	29
5.1.	Contract	29
5.2.	No obligation to award the contract	29
5.3.	Annexes	29
	<i>Annex 1: Model contract (for information)</i>	30

<i>Annex 2: information on the tenderer (one copy must be completed and signed by the tenderer and by each of the partners, as appropriate).....</i>	<i>30</i>
<i>Annex 3: Price and estimated budget breakdown (to be completed and signed by the tenderer).....</i>	<i>30</i>
<i>Annex 4: Certificate concerning exclusion criteria (to be completed and signed by the tenderer).....</i>	<i>30</i>
<i>Annex 5: Some Examples of comparative studies, research on volunteering in Europe</i>	<i>30</i>

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1. INTRODUCTION

1.1. General information

On 8 February 2007 the Commission adopted Decision 2007/114/EC amending Commission Decision 2005/56/EC setting up the Education, Audiovisual and Culture Executive Agency for the management of Community action in the fields of education, audiovisual and culture ('the Agency'), and extending the Agency's lifespan till 2015. The Agency's mission is to implement a number of strands of more than 15 Community-funded programmes and actions in the fields of education and training, active citizenship, youth, audiovisual and culture.

The Agency is in charge of most management aspects of the programmes, including drawing up calls for proposals, selecting projects and signing grant agreements, financial management, monitoring of projects (interim reports, final reports); communication with beneficiaries; and on-the-spot controls.

The Agency has its own legal identity and is located in Brussels. The Agency wishes to conclude a service contract for a 'study on volunteering in the EU'.

The services required are described in detail in section 3 of these tender specifications.

1.2. Management of the call for tenders

This call for tenders is managed by the Agency in cooperation with the European Commission. The Agency shall establish a Steering Committee, comprising representatives of both the Agency and the Commission, for the purposes of managing the contract, reviewing progress with the contractor, making recommendations, and accepting the services and products. A member of the Steering Committee will be nominated at the Agency as the primary contact point for all official correspondence.

The ownership of the products and deliverables shall be vested in the Commission.

1.3. Duration of the contract

The contract to be awarded will be the subject of an agreement in accordance with the model enclosed in Annex 1. The contract will be awarded for the duration of 9 months with effect from the date on which it is signed by the last contracting party. The planned start date for the study is December 2008.

The Agency reserves the right to make use of a negotiated procedure without prior publication of a contract notice for additional contracts involving services similar to those assigned to the party awarded an initial contract by the same contracting authority. That procedure may only be used during the three years following conclusion of the original contract.

2. GENERAL TERMS AND CONDITIONS APPLICABLE TO CALLS FOR TENDER

2.1. Tenders

Tenders must include all information and documentation required to enable the contracting authority to appraise tenders in accordance with the criteria set out in section 4.

All documents submitted by tenderers will become the property of the Agency and are to be deemed confidential.

Expenses incurred in preparing and submitting tenders shall not be reimbursed by the Agency.

The submission of a tender in response to a call for tenders issued by the Agency entails:

- (a) acceptance of the terms and conditions set out in this invitation to tender, in the specifications and in the model contract (see Annex 1), where appropriate,
- (b) waiver of the tenderer's own general or specific terms and conditions; the tender submitted is binding on the tenderer to whom the contract is awarded for the duration of the contract.

Tenders must be:

- (c) submitted in triplicate: one clearly identified 'Original', and two copies marked 'Copy 1' and 'Copy 2' respectively. 'Copy 2' should be unbound. An electronic version should also be submitted;
- (d) accompanied by the forms in Annexes 2 to 4, filled in and signed by the tenderer;
- (e) accompanied by a covering letter signed by the tenderer or its duly authorised agent;
- (f) perfectly legible in order to rule out any doubt whatsoever concerning the words or figures;
- (g) submitted inside two sealed envelopes; the inner envelope addressed to the department indicated in the call for tenders, should be marked:

**‘Call for tenders
Reference No EACEA/2008/07
For the attention of Unit – R2
Not to be opened by the internal mail department’**

Self-adhesive envelopes shall be sealed with adhesive tape and the tenderer shall sign across this tape.

Tenderer may choose:

1) to submit tenders either by post or by courier service; in this case, tenders must be dispatched no later than the final date specified in the covering letter to this call for tenders (proof of dispatch is constituted by the postmark or the date of the deposit slip) to the following address:

Education, Audiovisual and Culture Executive Agency (EACEA)
Unit R2
Office: BOUR 4/37
Ref. EACEA/2008/07
Avenue du Bourget 1
B-1140 Brussels (Evere)
Belgium

2) to deliver tenders by hand to the following address:

European Commission
EACEA
For the attention of Unit R2
Ref. EACEA/2008/07
Office: BOUR 4/37
Avenue du Bourget, 1
B-1140 Brussels (Evere)

no later than 16.00 on the final date specified in the covering letter. In this case, a receipt must be obtained as proof of submission, signed and dated by the official in the central mail department who took delivery. This department is open from 08.00 to 17.00 from Monday to Thursday and from 08.00 to 16.00 on Friday; it is closed on Saturdays, Sundays and specified Commission holidays.

IMPORTANT: please note the following important distinction between these two options for the submission of tenders:

A tender sent by post or courier service (option 1 above) must be posted no later than the final date shown in the letter. This means that the tenderer must post the tender on or before that date and that it may reach the Agency after that date, depending on how long the postal service takes to process the delivery.

By contrast, a tender delivered by hand to the Agency (option 2 above) must be delivered no later than the final date shown in the letter. This means that the tender must reach the Agency on or before that date.

In either case, it is the tenderer's responsibility to ensure compliance with the rules applying to the option that the tenderer has chosen for the submission of the tender.

2.2. Payment

Payments will be made as follows:

Pre-financing:

After the signature of the contract by the last contracting party, within thirty days of the receipt by the Agency of a request for pre-financing, with a relevant invoice, a pre-financing payment of an amount equal to 30% of the total amount of the contract shall be made.

Interim payment:

30% within thirty days of the date of receipt of the relevant invoice provided the interim report has been approved by the Agency.

Payment of the balance:

Following completion of the tasks and approval by the Agency and, where appropriate, receipt of any documentation required under this service, within thirty days of the date of receipt of the invoice by the Agency, payment of the balance corresponding to the relevant invoice shall be made.

2.3. Financial Guarantee

A financial guarantee is automatically required if the pre-financing amounts to at least EUR 150 000.

Where required the contractor shall provide a financial guarantee in the form of a bank guarantee or equivalent supplied by a bank or an authorised financial institution (guarantor) equal to the pre-financing under the contract.

2.4. Penalties

If the contractor fails to perform its obligations under the contract within the time specified in Article 1.2 of the model contract, then, without prejudice to the contractor's actual or potential liability or to the Agency's right to terminate the contract, the Agency may decide to impose liquidated damages of 0.2% of the amount specified in Article 1.3.1 of the model contract (Annex 1) per calendar day of delay.

2.5. Period of validity of tenders

Tenders shall be valid for 9 months from the final date for the receipt of tenders.

2.6. Price

The Agency awards contracts and makes payments in euro. Tenders must accordingly be expressed in euro. Tenders expressed in currencies other than the euro will be eliminated.

For tenderers in countries which 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.

Prices must be clearly indicated and show all pricing elements and unit costs. They must be fixed and inclusive of all costs (project management, quality control, training of contractor's employees, back-up resources, etc.) and expenses (company management, secretariat, social security, salaries, travel and office expenses, etc.) directly or indirectly connected with the provision of the service. All prices must be quoted exclusive of all taxes and dues.

Under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, the Communities are exempt from all taxes and dues, including Value Added Tax (VAT), and accordingly these charges may not form part of the price of the tender. The amount of VAT should be shown separately.

In signing and submitting a tender, the tenderer or, in the case of consortia consisting of two or more firms, each member of the consortium, certifies on behalf of their firm that:

- the prices indicated in the tender have been fixed independently, without any consultation or communication on any of the points relating to the price with another tenderer or competitor;
- unless the law stipulates otherwise, the prices indicated in the tender have not been and will not be voluntarily communicated by the tenderer to any other tenderer or competitor, directly or indirectly, before the tenders are opened;
- the tenderer has not attempted and will not attempt to induce other persons to submit a tender or to dissuade them from doing so with a view to restricting competition.

2.7. Conflict of interests

Tenderers should declare:

- that they do not have any conflict of interest in connection with the contract; a conflict of interest could arise in particular as a result of economic interests, political or national affinities, family or emotional ties, or any other relevant connection or shared interest;
- 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;

- 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 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.

The Agency reserves the right to check the above information.

2.8. Joint tenders

Joint tenders or tenders from consortia will be accepted. The nature and organisation of such tenders is at the discretion of the tenderers. A leader must be clearly identified and appointed by all other members of the consortium.

In any event, such tenders will be treated no differently from any other type of tender, each being assessed on its own merits in relation to the evaluation and award criteria contained in these specifications.

2.9. Subcontractors

Any intention to subcontract part of the contract must be clearly stated in the tender. In any case, the main contractor retains sole responsibility for the contract.

2.10. Contact point

The only contact point that may be used during the submission period, is the one indicated in the accompanying letter to this call for tenders. Tenderers are requested to put any questions in writing and to send them to the contact person by fax, email or mail.

For legal reasons, queries by telephone cannot be taken into consideration.

Queries concerning the administrative procedures will be treated individually. Replies to questions will be communicated simultaneously to all tenderers.

3. TECHNICAL SPECIFICATIONS

3.1. Introduction

The study is financed by the Europe for Citizens Programme, under action 3 and managed by the Citizenship unit of the Executive Agency in cooperation with Sports and Citizenship Units of the European Commission.

The study will:

- describe the volunteering landscape in the EU-27;
- analyse the findings (commonalities, differences, trends, challenges);
- provide recommendations for the EU in this area.

3.2. Context of the contract

3.2.1. International level

The importance of volunteering has been recognised by a number of major international organisations. 2001 was the UN International Year of Volunteers (IYV) and United Nations Volunteers (UNV) was designated as the international focal point. The issue of voluntary activities is often on the agenda of the international development agencies, led by United Nations agencies and programmes (e.g. the Millennium Development Goals) as well as of the Council of Europe (e.g. recommendation on improving the status and role of volunteers¹).

3.2.2. EU level

The EC Treaty has so far not included any specific reference to volunteers, voluntary action or voluntary services. However, in recent years, there has been a visible trend towards putting volunteering on the European (political) agenda. Numerous initiatives on the part of European institutions have sought to recognise the role of voluntary activities in Europe and to promote research in this area. Yet, no consideration has been so far given to the question how EU policies can affect volunteering, and how volunteering can contribute to help the EU achieve its stated economic and social objectives.

Volunteering has been addressed at EU institutional level in a number of ways. In 1983, the European Parliament adopted a "Resolution on volunteering"². In 1997, the Intergovernmental

¹ [Recommendation 1496](#), 31 October 2001, adopted at the 770th meeting of the Ministers' Deputies (24 October 2001).

² European Parliament Resolution on volunteering (Source Eur-lex, documentation not available on the Web).

Conference adopted Declaration 38 on volunteering, attached to the final act of the Treaty of Amsterdam³. The Commission issued in 1997 a *Communication on promoting the role of voluntary organisations and foundations in Europe*. Also the European Economic and Social Committee (EESC) and Committee of Regions (CoR) addressed in their opinions the importance of volunteering and its contribution to European societies⁴.

In the field of sport, there is a strong political demand for better support to voluntary sport structures in the EU. The European Council in its *Nice Declaration* (2000) called on Member States to "encourage voluntary services in sport, by means of measures providing appropriate protection for and acknowledging the economic and social role of volunteers, with the support, where necessary, of the Community".⁵ Ministers recognised in the "*Aarhus Declaration on Voluntary work in Sport*" (2002) the significant contribution of voluntary work to sport and its economic value.⁶ The Commission's White Paper on Sport (2007) recognises that "voluntary activity forms the basis for the organisation, administration and implementation of sport activities in all EU Member States" and that these "structures based on voluntary activity" form part of the common elements of the European approach to sport. The White Paper therefore seeks to promote volunteering in sport and non-profit sport organisations through specific actions.⁷ The Lisbon Treaty includes a specific reference to the need to promote "sport structures based on voluntary activity" at EU level. If the Treaty is ratified and comes into force, this provision should be considered when developing a future EU sport policy. For EU Sport Ministers volunteering in sport is a priority theme, in particular the role and status of voluntary non-profit sport organisations. Sport Ministers have urged the Commission to give due consideration to this in its policies.

Additionally, several initiatives in relation to volunteering have been carried out by the European Commission, especially in the area covered by the Directorate-General for Education and Culture. These include initiatives in the field of Youth (Youth Policy and Youth in Action Programme, notably the EVS – European Voluntary Service), Active European Citizenship (Europe for Citizens Programme) and the Life Long Learning Programme (Grundtvig). The development of a more consistent policy at European level is most advanced in the field of youth, with a number of Council resolutions and Commission communications.

³ <http://eur-lex.europa.eu/en/treaties/dat/11997D/htm/11997D.html>

⁴ EESC opinion on cooperation with charitable associations as economic and social partners in the field of social welfare, EESC opinion on role and impact of voluntary activities in European societies, CoR Opinion on the contribution of volunteering to economic and social cohesion. CdR 254/2007 fin, www.cor.europa.eu/en/documents/opinions.htm

⁵ Declaration on the specific characteristic of sport and its social function in Europe, of which account should be taken in implementing common policies; European Council, Nice, 2000.

⁶ Declaration on Voluntary work in Sport, European Council, Aarhus, 2002.

⁷ COM(2007)391fin., 11 July 2007.

The already existing documents and initiatives on volunteering thus underline its importance for several sectors of European society. They call upon decision-makers to support and promote voluntary activities so as to use the full potential of volunteering. However, a systematic approach towards volunteering is lacking so far at EU level.

3.2.3 National perspective

Various forms of voluntary activities have a long tradition in most European countries. These include full time and part time voluntary work in the care sector, volunteering in associations and clubs, the sport sector in particular, participation in local initiatives or big events (e.g. football championships), *ad hoc* mobilisation in response to specific circumstances (such as natural disasters), as well as involvement in the work and campaigns of political parties.

Diverse historical and cultural contexts result in different understanding and definitions of voluntary activities / volunteering. In some countries there is a particularly strong support for volunteering and a well-developed volunteer infrastructure; in others volunteering receives a rather negative connotation and/or voluntary organisations and structures are just starting to be set up. In this respect a report produced by the European Volunteer Centre in 2007 "Youth volunteering policies in Europe" is very informative even though it deals with a specific target group. However, the conclusions of the report can be also applied to other groups of volunteers and volunteering in general.⁸

Existing diversity makes it difficult but not impossible to draw a coherent picture of volunteering throughout the European Union and to identify common trends, needs and challenges.

3.2.4. Non-governmental stakeholders / Civil Society organisations

The voluntary sector has become better organised and more Europeans have become involved in voluntary activities on a regular basis - close to 8 out of 10 EU citizens consider helping others or voluntary work an important aspect of their life⁹. A more concerted approach towards volunteering at European level has therefore been increasingly advocated by civil society organisations.¹⁰

Civil society organisations have produced a number of policy recommendations based on an analysis of the needs of volunteers and volunteer organisations across Europe. For example, the *European Roadmap 2010* – an outcome of cooperation of different European volunteer and research centres, provides recommendations to EU institutions, national and local governments as

⁸ <http://www.cev.be/data/File/CEV-YOUVOLreport.pdf>

⁹ Special Eurobarometer "European social reality", February 2007, http://ec.europa.eu/public_opinion/archives/ebs/ebs_273_en.pdf

¹⁰ Major organisations involved in the promotion of volunteering at European level include Social Platform, European Youth Forum (EFJ), European Volunteer Centre (CEV), AVSO- Organisation of Voluntary Service, Volonteuropé, Caritas Europe, Solidar and others.

well as to the corporate sector and the voluntary sector itself. It was updated in the *Manifesto for Volunteering in Europe*¹¹ issued in March 2006 by the European Volunteer Centre (CEV).

These recommendations provide a helpful background on the needs identified by the volunteering sector and issues to be addressed by the study. The relevance of these recommendations for the European Commission should be examined without any prejudice to the outcome of the study.

The following is a compilation of the most important recommendations (by aforementioned organisations and bodies):

a) With regard to promotion and recognition:

- Acknowledge the need for a better understanding of the volunteering landscape in the EU and the need for European comparative research in order to obtain data on volunteering, its scope and characteristics at European level;
- Recognise the link between volunteering and active citizenship (volunteering is an expression of and contributes to active citizenship and a feeling of belonging and European identity);
- Publish a White Paper on volunteering and active citizenship in Europe leading to a strategy for strengthening the European dimension of voluntary work and promoting volunteer activity in EU policies acknowledging its horizontal nature;
- Recognise the role of and target volunteering in development policies, social cohesion, integration policies, active ageing etc.;
- Include alternative economic indicators into the Statistical Accounts of EUROSTAT and national statistics;
- Encourage the inclusion of volunteering in civic education programmes in schools and the recognition of skills developed through volunteering within Europass; promote community development programmes and partnerships as part of school curricula.

b) With regard to support and facilitation:

- In general – address and help to remove obstacles to volunteering: lack of information and data, lack of infrastructure, visa and mobility problems, prejudices etc.;
- Design special European volunteering programmes (measures) for all age groups (e.g. seniors, employees and people with disabilities);

¹¹ http://www.cev.be/64-cev_manifesto-EN.html

- Support certification schemes for volunteers aimed at recognising the development of competencies through volunteering in the educational systems of EU Member States and develop a European framework for validating informal and non-formal learning;
- Develop a European Charter of Volunteers;
- Declare a European Year of Active Citizenship through Volunteering;
- Stimulate the development of national volunteer policies and legal frameworks by proposing common European standards, promoting good practice in the field between Member States etc. (promotion of common thinking, indicators, measures; volunteer rights- insurance and the reimbursement of expenses; facilitation of visa procedures for "European" volunteers, EVS etc.);
- Allocate resources for the development of infrastructure to support and facilitate volunteering;
- Recognise volunteering to a greater extent as a contribution to European projects, equivalent to co-financing; facilitate funding possibilities and promote the ownership by volunteer groups of volunteer initiatives and projects.

c) With regard to networking:

- Establish an inter-service group on volunteering in the Commission (due to its horizontal nature);
- Establish cooperation in the field of volunteering with other EU institutions (EP, EESC, CoR);
- Enable and support networking between the voluntary and private sectors (partnerships);
- Facilitate European networks of volunteers and the visibility of volunteering (awards for volunteers);
- Organise regular consultations with bodies/organisations which promote and support volunteering.

In the field of sport, sport organisations have highlighted on many occasions the importance of voluntary engagement for the running of sport clubs, and thus for the maintenance of local sport as a basis for supporting the whole sport structure. They have pointed to new challenges for the volunteer and the voluntary sport organisation and also called for European solutions, e.g. developing an EU agenda on volunteering in sport, cutting red-tape, encouraging and promoting voluntary activity in the field of sport through different means and raising awareness of the specific concerns of the volunteer and the voluntary sport organisation within EU policy making.

3.3. Purpose of the contract – Specific objectives, field of application

3.3.1. General objective

The study should help the European Commission to better understand the national, regional and local realities of volunteering in the 27 EU Member States, including ongoing challenges for the volunteer and the voluntary organisation and with regard to the services provided by them. It should enable the Commission to identify in which way the sector could contribute to help the EU achieve its strategic objectives in the economic and social fields (e.g. Social Agenda, Lisbon agenda). The study should help policy-makers to determine the scope of possible future initiatives at European level aimed at promoting volunteering.

The study should raise awareness on the side of European policy makers of the possible benefits of supporting volunteering at both national and European level. Volunteering being based on values such as solidarity, integrity, respect and disinterested sharing can be considered a manifestation of European values, but no data-based evidence for such a hypothesis exists. It appears that awareness of the great societal value of volunteering is not a sufficient argument for decision-makers to take action. The study must therefore also concentrate on other, more "concrete" and measurable benefits of volunteering for the well-being of European societies.¹²

The study is targeted primarily at European policy-makers, but also intended as an additional information tool for national, regional and local-level decision-making. The study should also serve as a resource base for other interested parties, such as civil society organisations, sport organisations, practitioners, researchers, academics, etc.

The study should provide a special focus on volunteering in sport in order to address the specific characteristics of this sector.

3.3.2. Specific objectives

In light of the above, the study aims at providing a consistent picture of volunteering in the EU and should cover

- a) a *description* of the volunteering landscape in all 27 Member States, including facts (legal, economic, social, administrative, cultural) and figures (exhaustive, up to date, comparable and evidence-based data), supported by a description of EU policies, programmes and actions that have an impact on volunteering;
- b) an *analysis* of the findings, including the identification of common trends and differences as well as of major needs and challenges;

¹² Such an approach takes account of the fact that people's well-being and quality of life is generally positively correlated with economic wealth. However, while GDP measures the final market values of goods and services it is only a limited indicator to measure well-being. Other indicators, possibly social indicators, should be considered.

- c) a set of recommendations for policies and actions which could be more effectively implemented at the European level rather than at national and regional / local levels. In this respect, account should be taken of already existing recommendations from stakeholders.

A case study for sport in all three parts is necessary in order to take account of the specific requirements and nature of the sport sector.

3.4. Services

3.4.1. Geographical area to be covered

The study will cover at least the 27 Member States of the European Union.

3.4.2. Existing material

The study should build on existing studies and documentation and, where necessary, update or complete existing information and data (notably to cover EU-27). This is not least in order to avoid that too many resources are spent on data collection to the detriment of the analysis and recommendations parts.

3.4.3. Research / surveys involving governmental and non-governmental stakeholders

The following stakeholders should be consulted (non-exhaustive list):

- Member States' Ministries and other administrative bodies responsible for volunteering (this will differ from one Member State to another);
- European umbrella organisations in the field of volunteering namely the European Volunteer Centre (CEV), Association of voluntary service organisations (AVSO), CARITAS Europe, Volunteurope, European Social Platform, European Youth Forum and Solidar;
- National member organisations of CEV.

For the case study on sport, at least the following organisations should be consulted:

- Member States' sport departments, Finance Ministries and other administrative bodies involved with volunteering in sport;
- Umbrella sport organisations, notably IOC, EOC, ENGSO, ENGSO Youth, NOCs and other national sport confederations;
- European sport federations;
- Others: e.g. EOSE, EASE, The Alliance.

3.5. Requirements

3.5.1. Taking into account existing research and addressing remaining gaps

The study needs to take into account the existing studies as well as research and data on volunteering produced by research institutes, universities and civil society organisations (*see section 3.4 and annex 5*). The following limitations have to be considered:

- existing studies often use very different methodologies (e.g. different indicators, different data);
- no research has been carried out systematically in all 27 EU Member States at the same time;
- existing studies are mainly based on facts and figures about volunteering in the third sector (non-profit organisations) without taking account of different national traditions.

3.5.2. Consistency with EU strategies and priorities

The issue of volunteering needs to be treated in the context of the EU's overall political priorities. The Commission has set itself medium- to long term priorities in order to build a better and stronger Union to the benefit of all EU citizens. It has committed to use the potential of Europe to the fullest while striving to achieve its two major strategic goals of "prosperity" and "solidarity", notably through actions in the cross-cutting area of the Lisbon Strategy which aims at obtaining tangible results for sustainable growth and better jobs. A number of studies indicate that volunteering, due to its very nature, plays a positive role in meeting economic and social policy goals, e.g. in the areas of regional development, social cohesion, job creation, non-formal education and social inclusion.

In an effort to ensure sound policy-making at EU level, the study should therefore take account of the potential of volunteering to help achieve the EU's political ambitions. It should in particular illustrate:

- how volunteering can make a contribution in support of policies aimed at meeting the Lisbon Strategy goals in terms of growth and job creation, including the Social Agenda which forms part of this strategy;
- how volunteering can further the integration and cohesion goals of the EU.

3.5.3. Consistency with the concept of Active European Citizenship and the aims of the Europe for Citizens programme

The study needs to identify the link between the concept of Active European Citizenship and volunteering.

There is a consensus that volunteering is an expression of active citizenship at community or societal level. However, the link between volunteering at community and societal level and active European citizenship is less clear. Whilst it is true that there appears to be a number of

people, especially young people, who participate in exchange schemes at European level, the vast majority of voluntary activities take place within the national or local context. Therefore, the study should:

- examine whether volunteering makes people more prone to engage in other types of participatory behaviour (i.e. more engaged in public life at national and/or European level);
- explore the effect of volunteering on positive individual attitudes towards Europe in particular and diversity in general ("mind changing/horizons opening");
- look at the possible link between certain types of voluntary engagement in specific areas (environmental protection, social care, sport, etc.) and attitudes towards Europe, starting from the hypothesis that in an area with a distinct European/global dimension and a clear EU competence volunteers tend to act in a more European way;
- identify areas in which the Europe for Citizens programme can contribute to strengthening the European dimension of volunteering (by providing support to networks of volunteers, promoting exchange of best practices etc.).

3.5.4. Consistency with the White Paper on Sport

The White Paper on Sport devotes a section to volunteering in sport and to (voluntary) non-profit sport structures. The Action Plan "Pierre de Coubertin" provides for specific actions that the study should take into account:

- Action 14: "In order to understand better the specific demands and needs of the voluntary sport sector in national and European policy making, the Commission will launch a European study on volunteering and sport." This action forms the basis for the sport-related parts of this study;
- Action 10: "Together with the Member States, the Commission will identify key challenges for non-profit sport organisations and the main characteristics of services provided by these [non-profit sport] organisations."

3.6. Methodological remarks

3.6.1. Workplace

Apart from the missions necessary to collect and analyse data and to attend meetings in Brussels (see below) there is no specific requirement regarding the place to execute the contract..

The contractor shall meet the Steering Committee in Brussels when the study is launched and for the presentation of the initial report, interim report and draft final reports.

3.6.2. Schedule

3.6.2.1. Contract implementation period

The indicative starting date for implementation of the contract is December 2008. Implementation will start on the day after the signature of the contract by both parties.

The duration of the project will be nine (9) months.

3.6.2.2. Indicative calendar

Start of month 1: kick-off meeting with the Agency

Middle of month 3: first intermediate meeting

Start of month 5: meeting to discuss the intermediate report

Start of month 7: second intermediate meeting

Middle of month 8: meeting to discuss the draft final report

Start of month 9: presentation of final report

End of month 9: transmission of final report

3.7 Outputs and results

The study should be composed of the following three parts:

- a) Description of the current volunteering landscape in the EU-27, including complete, consistent and comparable facts and figures;
- b) Analysis of the findings: highlighting critical issues, common trends, challenges;
- c) Policy recommendations: identifying challenges and actions at EU level.

3.7.1 Descriptive part: state of play in the Member States

Complete, consistent and comparable information and data is expected for the 27 EU Member States, including a case study for sport. Both quantitative and qualitative data have to be provided. In addition, the description should cover a listing of those EU policies, programmes and actions that currently impact on volunteering.

3.7.1.1. Facts and figures for the 27 EU Member States

The study will provide the following elements:

a) Definition of volunteering

The study should seek to provide a description of a country's notions, traditions and concepts for volunteering.

b) Legal framework

The study should identify the key legal provisions regarding the status and the activities of "volunteer organisations" (e.g. NGOs, non-profit structures, CSR) on the one hand, and the "volunteer" on the other. If appropriate, a distinction should be made between national, regional and local legal provisions. Reference should also be made to specific support schemes, e.g. in the fields of subsidies, taxation, procurement, insurance.

c) Political dimension

The study should identify national policies and programmes in support of volunteering. If appropriate, a distinction should be made between national, regional or local level policies. In this chapter, the study should also describe whether and, if yes, to what extent volunteering replaces a State competence ("public service substitution").

d) Organisational framework

The study should describe the country's typical structures for volunteer work (e.g. nature of the organisation, networks, affiliation in European umbrella organisations) and typical forms of volunteering (e.g. by identifying key sectors).

e) Funding

The study should identify the main economic resources for voluntary activity (volunteers and volunteer organisations) and identify the main public economic incentives to promote volunteering. If appropriate, distinction should be made between the State, the regional and the local levels. In addition, the study should compare the share of public and private funding of a typical volunteer organisation.

f) Social / societal dimension

The study should describe the country's understanding of the role and added value of volunteering for society both from the volunteer perspective¹³ and from the collective perspective.¹⁴

g) National data on volunteering

Based on national data, the study should provide statistical data, harmonised to the maximum extent possible, as follows:

- Number of volunteers

¹³ A survey based on interviews at the volunteer level could be an appropriate tool.

¹⁴ E.g. volunteering as a tool for social cohesion, professional and social inclusion

- Full time / Part time
- Per sector (e.g. charity, social and health care, sport, environmental protection)
- Per target group (e.g. senior citizens, youth, people in active occupation, unemployed people, disabled people, minorities etc.)
- Number of (typical) volunteer organisations
- Economic value of volunteer work:
 - Voluntary sector workforce in relation to the country's total paid workforce
 - Share of the voluntary sector workforce in the total paid workforce if converted into full-time employment
 - Share of GDP

3.7.1.2. Case study: sport

Figures seem to suggest that more volunteers are engaged in the sport sector than in any other sector.¹⁵ Moreover, it is generally considered that volunteering in sport, notably at the grassroots level, is crucial for the functioning of the whole sport sector from the grassroots to the top, and forms a constituent element of the specific way how sport is organised in Europe. Therefore, a case study for sport should be made based on the above topics, focussing however on the specific situation in the sport sector (autonomy of the sector, specific organisational structures, non-profit sport clubs that operate both at the grassroots and in the professional sphere).

3.7.1.3. Existing EU policies and programmes with an impact on voluntary volunteering at least in the following areas

The study should list EU policies and programmes that have an impact on volunteering, at least in the following areas:

- Active citizenship
- Employment and social policies
- Internal Market policies (in particular public procurement rules)
- Competition policy (in particular State aid rules)
- Taxation

The current impact of EU level action on volunteers, voluntary organisations and services provided by them should be illustrated by a case study for the sport sector. If considered appropriate, a specific analysis could be provided for two "typical" and wide-spread sport disciplines that rely heavily on volunteering (e.g. football, gymnastics).

¹⁵ This has to be confirmed by the study.

3.7.2. Analysis of the findings: issues, trends, challenges

On the basis of the description to be provided under point 3.3.1., the study will make an analysis of the findings, notably by identifying

- Common trends and differences among MS in the different areas (legal, political, economic, social);
- Main trends: past and expected future developments;
- Key challenges / obstacles for the promotion of volunteering at national and European levels. In this section, the study should also address to what extent volunteering substitutes commercial or public activities and whether or not there is a risk of preventing the creation of paid jobs.

The analysis for the situation in the field of sport should be considered separately in the case study for this sector.

Innovative and creative approaches to illustrate these findings are expected for this part of the study.

3.7.3. Recommendations on how to address the identified challenges and issues at EU level:

- Suitable policies to promote volunteering¹⁶
- Suitable programmes
- Suitable networks
- Suitable legal measures

This part of the study will clearly indicate the added value of the identified actions at EU level.

The recommendations for volunteering in the field of sport will be elaborated on the basis of the case study for this sector, including a scenario for the possible implementation of the sport provisions in the Lisbon Treaty. Article 149 of the EC Treaty as amended by the Lisbon Treaty provides for the development of an EU sport policy that takes account of sport "structures based on voluntary activity" and thus for possible new opportunities to promote volunteering in sport.

While the focus should be on the EU level, recommendations for the national level and for non-governmental organisations are also welcome, in particular when challenges need to be addressed in an area where the scope for EU level action is limited.

¹⁶ E.g. Policies run by DG EAC (citizenship, sport, youth, culture, education), Internal Market policies (recognition of diplomas, procurement, free movement of services, insurance issues), Employment and social policies (to address employability, social integration, social cohesion, ageing), taxation policies etc.

3.8. Reports

3.8.1. Drafting and transmission of reports

Each report will be submitted in 3 copies in English with a summary report in French and German language.

The Agency will have 60 days to approve each report and/or request more information or additional documents. In the absence of a reply from the Agency within 60 days, the report will be deemed approved.

Within 15 days from receiving the Agency's comments, the contractor will submit the final version of each report. In cases where s/he does not follow the Agency's comments, s/he will indicate clearly why s/he has not done so. If the Agency still considers the report unacceptable, the contractor will be invited to make additional modifications until the Agency can accept the report.

3.8.2. Intermediate report

The intermediate report will be submitted within 4 months following the kick-off meeting. The report will contain at least the following elements:

- Comprehensive information on progress made toward the outputs and results specified in section 3.3 above;
- Problems encountered, solutions found or proposed, and impact on the following stages of the preparation of the study;
- Detailed calendar and methodology for completing the study.

3.8.3. Final report

The final report will be submitted within 9 months following the signature of the contract by both parties. In addition to the outputs and results defined in these Terms of Reference, the final report will also include:

- A summary not longer than 5 pages, written in terminology which is understandable for the general public;
- A list of all institutions, organisations and persons consulted in the course of the study.

3.9 Budget

The maximum budget available is EUR 300 000.

4. EVALUATION AND AWARD OF THE CONTRACT

The evaluation will be based on the information provided by the tenderer in the tender submitted in reply to this call for tenders.

In addition, the Agency reserves the right to use any other information from public or specialist sources. All the information will be assessed in the light of the criteria set out in these specifications.

The evaluation will proceed in stages, as described below. Only the tenders meeting the requirements of each stage will pass on to the next stage of the evaluation. The final stage involves the award of the contract.

The stages of the evaluation procedure will be as follows:

- exclusion of tenderers;
- selection of tenderers;
- evaluation of tenders on the basis of the award criteria:
- technical evaluation;
- financial evaluation;
- award of the contract.

4.1. Exclusion of tenderers

Tenderers must certify that they are not in one of the situations referred to in Articles 93 and 94 of the Financial Regulation. To this end, tenderers shall provide a declaration on their honour, duly signed and dated, stating that they are **not** in one of the situations listed below.

Candidates or tenderers who are in one of the following situations shall be excluded:

- a) they are bankrupt or being wound up, 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 serious 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 are guilty of misrepresentation in supplying the information required by the contracting authority;

- f) 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;
- 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.

For joint tenders (consortia), each member of the consortium must submit the required documents. The exclusion criteria will be applied to each of the members of the group individually, and to the group as a whole.

The tenderer to whom the contract is to be awarded must provide, within the time limit stipulated by the contracting authority and preceding the signature of the contract, the evidence confirming the declaration referred to in the first paragraph.

4.2. Selection of tenderers

4.2.1. Professional capacity

In order to assess the professional capacity of the tenderer, the following information must be supplied:

- company name;
- date of foundation of company;
- copy of articles of association;
- enrolment in trade register;
- VAT number;
- company's activities;
- composition of the board of directors;
- certificate dated less than 90 days previously, issued by the competent authority of the tenderer's country showing that it has fulfilled all obligations concerning the payment of tax and social security contributions.

In the case of a consortium, all partners must provide the information required.

4.2.2 Economic and financial capacity

In order to assess the financial capacity of the tenderer, the following information must be supplied:

- balance sheets and profit and loss accounts for the two previous years;
- a bank declaration concerning the financial situation.

In the case of a consortium, all partners must provide the information required.

4.2.3 Technical capacity

The tenderer must meet the following criteria:

- The prospective contractor:
- The prospective contractor:
 - must have qualified experts with a good knowledge of EU and national policies in the area of active European citizenship and sport, including the legal, economic and social context in which volunteering takes place;
 - must have qualified experts with a solid knowledge in other EU policy areas that have or are likely to have in the future an impact on volunteering (internal market, taxation, competition and State aid among others);
 - have experience in conducting similar studies, including the mobilisation of a team with the necessary skills to conduct the study in the 27 EU Member States (e.g. languages, knowledge about local, regional and national context) .

In order to assess the technical capacity of the tenderer, the tenderer must supply the following information:

- Experience, qualifications and professional experience of the tenderer's full-time personnel:
 - indicate the tenderer's total full-time staff numbers;
 - list of personnel capable of performing the tasks of this tender specification. The tenderer shall state the experience, skills and knowledge of languages of the persons concerned and shall enclose a copy of their CV;
 - presentation of other relevant information to illustrate the skills and experience of the personnel in relation to the tasks described in this call for tenders;
- Possession of the necessary skills and at least three years' experience of direct relevance to the activities concerned or to provision of the services and products covered by this call for tenders. The tenderer shall provide:
 - examples of other work similar to the services and products covered by this call for tenders, and a description of how the firm has carried out the same type of work in the past. If the firm has carried out only part of the work as principal contractor, the tenderer shall specify how the other strands were subcontracted;
 - references from the firm's customers;
 - a list of the customers for whom the firm has worked in the last three years;
 - a description of the measures applied to ensure the quality of the services and the tenderer's study and research resources.

If subcontracting: indicate the share that the tenderer intends to subcontract, with the references of the proposed subcontractors and their agreement in writing.

In the case of a consortium, all partners must provide the information required.

4.3. Evaluation of tenders

Offers will be evaluated in relation to the following criteria (Article 53 of Directive 2004/18/EC).

The technical and financial evaluations will each be graded out of 100. The contract will be awarded to the tenderer whose offer represents the best quality/price ratio.

4.3.1 Technical evaluation

- Methodology (50 points)
 - Credibility and thoroughness of research project;
 - Credibility of data collection techniques;
 - Credibility of data analysis techniques;
 - Identification and quality of sources proposed as the basis for the documentary research.

This criterion shall be evaluated based on a methodology provided by the tenderer, who shall state how it envisages achieving the objective and results defined in point 3 and shall cover points such as: the schedule, organisation of the work, allocation of tasks to personnel, a preliminary evaluation of the problems and probable results, an explanation of the aim and the nature of the tasks to be undertaken.

- Project management (40 points)
 - How closely the profile of the team members corresponds to the tasks assigned to them and how appropriately all the issues stated in point 3 are dealt with;
 - How clear the objectives and intermediate steps are; and
 - How well resources are allocated.
- Quality of geographical coverage (10 points)

Tenders scoring at least 65 points out of 100 and scoring at least 50% of the points available for each criterion (methodology, project management, quality of geographical coverage) will be classified as technically acceptable and will be submitted to financial evaluation.

4.3.2. Financial evaluation

Points will be awarded to the tenders eligible to participate in the financial evaluation on the basis of the following formula:

- 100 points will be awarded to the lowest-priced tender;

- the following formula will be applied to the other tenders:
(lowest-price tender/price of the tender in question) x 100.

4.4. Award of the contract

The contract will be awarded to the tenderer offering the best price/performance ratio:

This will be achieved by multiplying:

- the result of the technical evaluation (number of points) by 0.5;
- the result of the financial evaluation (number of points) by 0.5.

The two results will be added together and the contract will be awarded to the tender obtaining the highest score at the end of this process.

5. GENERAL CONDITIONS FOR THE AWARD OF CONTRACTS

5.1. Contract

The contract shall take the form of a service contract based on the model contract annexed to these specifications, amended and completed on the basis of the selected tender to which the general terms and conditions set out in the enclosed model contract shall apply. The contract shall be signed by the authorised representatives of the Agency and the tenderer.

In the case of a consortium, each contract shall be signed by the leader of the consortium in the name of all the consortium's members. Each member of the consortium must sign a mandate acknowledging the signature of the contract by the consortium leader.

5.2. No obligation to award the contract

Initiation of a tendering procedure imposes no obligation on the Agency to award a contract. The Agency is not liable for any compensation with respect to tenderers whose tenders have not been accepted. Nor shall it be so liable if it decides not to award the contract.

5.3. Annexes

The following documents constitute the annexes to these tender specifications, of which they form an integral part:

Annex 1: Model contract (for information)

Annex 2: information on the tenderer (one copy must be completed and signed by the tenderer and by each of the partners, as appropriate)

Annex 3: Price and estimated budget breakdown (to be completed and signed by the tenderer)

Annex 4: Certificate concerning exclusion criteria (to be completed and signed by the tenderer)

Annex 5: Some Examples of comparative studies, research on volunteering in Europe