

Call for tender: Developing a situational analysis of the European Patients' Forum

25/01/2017



Contents

1. EPF General Information.....	3
2. Background information	3
3. Purpose of the tender	3
4. Description of services	4
4.1. Specific Tasks	4
4.2. Timeframe	4
4.3. Format of the report	5
5. Participation in the tendering procedure	5
6. Participation in the tendering procedure	5
6.1. Tender submission	5
6.2. Tender process.....	5
6.3. Tender evaluation	6
6.4. exclusion criteria	6
6.5. Schedule.....	7
7. Terms of payment.....	7
8. Quality issues	7
9. Confidentiality and conflict of interest	7
10. Terms and conditions	8
11. Contact person	8
12. Contracting authority	8

1. EPF General Information

The **European Patients' Forum (EPF)** was founded in 2003 to ensure that the patients' community drives policies and programmes that affect patients' lives to bring changes empowering them to be equal citizens in the EU.

EPF currently represents 67 members, which are national coalitions of patient organisations and disease-specific patient organisations working at European level. EPF reflects the voice of an estimated 150 million patients affected by various chronic diseases throughout Europe.

EPF's vision for the future is that all patients with chronic and/or lifelong conditions in the EU have access to high quality, patient-centred equitable health and social care.

For more information, please visit: www.eu-patient.eu

2. Background information

This call for tender refers to the preparatory work for the mid-term review of the EPF Strategic Plan 2014-2020. EPF's Strategic plan has been developed in 2013.

After three years of implementation, we have planned to review it in order to integrate the latest changes in the European health and social policy environment and to incorporate new challenges and opportunities for EPF as an umbrella of patient organisations active across Europe.

As a reference, EPF's Strategic plan for 2014-2020 is available here: <http://www.eu-patient.eu/library/Strategic-Plan/>

3. Purpose of the tender

The purpose of this tender is to select a professional Consultant **to revise the environmental analysis** which constitutes the introduction to EPF's current Strategic plan.

The Consultant will **perform a situational analysis of the external environment** that shapes and affects the current and future activities of the European Patients Forum, including: economic factors, political factors, including (but not exclusively focusing on) health and social policy developments, technological/scientific factors and socio-cultural factors.

The report will also **identify the threats and the opportunities** that this changing environment entails for EPF.

The report produced shall enable the European Patients' Forum to check if its Strategic Goals are still fit for the current environment and to adapt them if necessary.

4. Description of services

4.1. SPECIFIC TASKS

The above-mentioned services involve the following tasks:

Task 1 – Initial desk research on the current trends and developments and first round of interviews with relevant stakeholders. On the basis of this initial work, production of a first short draft with environmental analysis.

Task 2 – Attend panel session with stakeholders at EPF Leadership Meeting on 11 April to collect feedback from different stakeholders on the initial draft.

Task 3 – Conduct additional bilateral interviews with EPF partners and European health policy stakeholders – if necessary.

Task 4 – Update and expand on the initial draft of the situational analysis. Include threats and opportunities for the European Patients’ Forum, in the light of our current strategic goals.

4.2. TIMEFRAME

Task	Description	Deliverables description	Estimated due date
Task 1	Initial data collection on the current trends and development (economic; political; socio-cultural; scientific/technologic) Desk research and first round of interviews with relevant stakeholders.	First (short) draft with environmental analysis (about 4 pages)	31 March 2017
Task 2	Attend panel session with stakeholders at EPF Leadership Meeting on 11 April 2017	Report of the panel session	21 April 2017
Task 3	Conduct additional bilateral interviews with EPF partners and European health policy stakeholders - if necessary	NA	11 April – 30 April 2017
Task 4	Update and expand on the initial draft of the situational analysis. Include threats and opportunities for the European Patients’ Forum in the light of our current strategic goals.	Report on the situational analysis of the European Patients Forum.	30 April 2017

4.3. FORMAT OF THE REPORT

- The expected length of the report is 10-15 pages, all parts included.
- It shall include:
 - Trends and developments that will affect the patients' community over the next five years: economic factors, political factors, technological/scientific factors and socio-cultural factors.
The situational analysis should focus on developments at European level; however, any notable event or change of situation in a European member state or beyond that could have an impact on EPF's work should be taken into account.
 - How these trends and developments translate into challenges and opportunities for EPF in the light of our current strategic goals.

5. Participation in the tendering procedure

The maximum contract price is EUR 5.000 including fees, administrative overheads and VAT.

The duration of the assignment is around 2 months. The minimum total number of days for the service is 10, spread out across the two months.

Reimbursements for travel (if any): reimbursements will be done by EPF based on reimbursement requests accompanied by original receipts of travel and subsistence expenses.

6. Participation in the tendering procedure

6.1. TENDER SUBMISSION

Tenderers should submit the following documents:

- Tender submission form
- CV/s of people involved in implementing the tasks;
- A list of references and examples of work;

The offer should be submitted to Camille Bulot, EPF Membership & Stakeholder Relations Manager (camille.bulot@eu-patient.eu) by 24 February 2017.

6.2. TENDER PROCESS

EPF reserves the right to conduct the tender process and select the successful tender. EPF is not bound contractually or in any way to a bidder to this request for tender until EPF and the successful winner have entered into a written contract.

6.3. TENDER EVALUATION

Participation in this tendering procedure is open on equal terms to all natural and legal persons fulfilling the abovementioned eligibility criteria and language requirements. EPF may, in its discretion, extend the closing date and time of the tender.

The selection procedure will be based on the principles of equal treatment, fairness and transparency and on expertise (80%) and price (20%).

All applicants will receive acknowledgement of receipt of their tender and will be informed of the outcomes of the selection process within one week following the deadline date. EPF is not obliged to provide reasons for its decision to shortlist; accept or reject any particular tender.

Offers to the tender will be evaluated based on the following criteria:

Qualitative award criteria	Points
Qualitative criteria 1: A cost proposal - Most economically advantageous tender for a maximum budget of 5000€, VAT included.	20
Qualitative criteria 2: Expertise in conducting situational analysis and SWOT analysis. If possible please provide a list of references and examples of work.	25
Qualitative criteria 3: Demonstrated knowledge of the European health scene. Experience of working with patient organisations a plus.	25
Qualitative criteria 4: Congruence of proposal with the timeline - Measures in place to ensure timely delivery of the services concerned.	15
Quality criteria 5: Knowledge of English language at mother-tongue level	15

6.4. EXCLUSION CRITERIA

Candidates or tenderers shall be excluded from participation in this 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 EPF 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 EPF 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 Union’s financial interests;
- f) following another procurement procedure or grant award procedure financed by the Union’s budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.

6.5. SCHEDULE

The tender is open from 25 January 2017 to 24 February 2017.

Tender submission and schedule of the work are as follows:

Launch Tender	EPF	25 January 2017
Close of the Tender	Tenderer	24 February 2017
Selection of the tenderer	EPF	28 February 2017
Signature of the Contract / Briefing session with EPF Membership & Stakeholder Relations Manager to agree on the objectives, the methodology, and the process;	EPF - Tenderer	1 March 2017
Start of the assignment	Tenderer	1 March 2017
End of the assignment	Tenderer	30 April 2017

7. Terms of payment

Prices must be fixed amounts in Euro and will not be subject to revision. The amount of VAT should be shown separately on the price offer and invoice.

Costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.

8. Quality issues

In delivering the service the tenderer shall ensure the highest quality standards of which EPF shall be the sole judge.

9. Confidentiality and conflict of interest

The Tenderer undertakes that they will not at any time, either before or after the termination of this service, use or disclose or communicate to any person confidential information relating to the affairs of EPF. This restriction shall continue to apply after the termination of the service without limit in point of time.

To ensure the independence of terms of their contract, the winning tenderer will sign a declaration certifying that they have no conflict of interests in relation to the tasks to be undertaken and undertake to inform Camille Bullot, Membership & Stakeholder Relations' Manager should this status change.

10. Terms and conditions

EPF reserve the right to reject any and all proposals, in whole or in part, to advertise for new proposals, to abandon the need for services, and to cancel or amend this call for tender at any time prior to the execution of the written contract. EPF reserves the right to waive any formalities in the call for tender process. EPF may respond to questions or provide information from tenderers, and is under no obligation to provide such responses or information to all other tenderers.

By submitting a proposal, the tenderer agrees that:

- EPF may copy the proposal for purposes of facilitating the evaluation of the proposal and agrees that such copying will not violate the rights of any third party.
- It will not bring any claim or have any cause of action against EPF based in any misunderstanding concerning the information provided or concerning EPF's failure, neglect or otherwise, to provide the bidder with pertinent information as intended by this call for tender.

The accomplishment of a tendering procedure imposes no obligation on the EPF to award the contract. Should the invitation to tender cover several items or lots, EPF reserves the right to award a contract for only some of them. EPF shall not be 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.

11. Contact person

For more information, please contact:

Camille Bullot
Membership & Stakeholder Relations Manager
camille.bullot@eu-patient.eu
Tel: +32 (0)2 274 08 61

12. Contracting authority

European Patients' Forum (EPF)
Rue du Commerce 31
1000 Brussels
www.eu-patient.eu

In witness whereof this Contract has been entered into the day and year set out below:

Signed by the European Patients' Forum:

on the day of 20.....

Signed by the Tenderer:

on the day of 20.....