



Technical specifications

Framework contract for Expert assistance on State of the Environment Reporting (SOER2005) and indicator-related activities

1. Background information: Overall objectives of European Environment Agency (EEA) work on crosscutting assessments – State of the environment reporting and indicator-related activities

According to the EEA Strategy 2004-2008, one of its priorities will be to conduct regular crosscutting assessments. With regard to the EEA Regulation, the EEA will publish every 5 years a report on the state, trends and outlooks on Europe's Environment, supplemented by more regular indicator-based reports. This will be done to support policy planning and in particular the mid-term review of the EU 6th Environment Action Programme (6EAP) (to be done in 2006). Furthermore, all activities in this area will focus on measuring progress and benchmarking.

Specific projects/assessments to be developed under this frame, in an integrated way, are:

- State of the Environment and Outlook Report 2005 (SOER2005)
- Support to the EEA Expert Group on Indicators and Reporting Guidelines (EG-IRG)
- Annual Signals report (EEA Signals)
- Development and maintenance of a Core Set of Indicators (CSI)

Other priorities of the EEA Strategy 2004-2008, like sectoral assessments, policy effectiveness analysis, scenarios and prospective studies, as well as the work under the Sustainable Development and enlargement agendas (not to mention the issues driven assessments) will be used as input material for the projects listed above.

According to the calendar for the mentioned activities, priority will be given, at a first stage, to the State of the Environment and Outlook Report due in 2005 - SOER2005.

According to the EEA Regulation 1210/90/EEC article 2, a key task of the European Environment Agency (EEA) is:

(vi) 'to publish a report on the state of, trends in and prospects for the environment every five years, supplemented by indicator reports focusing upon specific issues'

The most recent EEA State of the Environment and Outlook Report, entitled 'Europe's Environment at the Turn of the Century', was published in 1999. The EEA has initialised the preparation of its next State of the Environment and Outlook report (SOER2005), to be published in 2005, in order to comply with the EEA Council Regulation and to support the mid-term review of the 6EAP of the European Union. The report will provide an assessment of both past trends and outlooks for Europe's environment.

It is the current thinking of the EEA that SOER2005 will be a brief and concise report supplemented by a number of sub-reports (SR) already being prepared. More information on these SR can be found in the table below.

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| <p><i>SR1: Sustainable Household consumption – trends, outlooks and policy effectiveness</i></p> <p>This report will provide an integrated assessment of the past trends and future outlooks for the European household sector and its environmental effects. The report focuses on the recent and possible future changes in the consumption of the main goods and services by European households, the major environmental effects of consumption and the effectiveness of policies to limit these effects.</p> <p>The report is being prepared by EEA in corporation with researchers at the International Centre for Integrative Studies (ICIS) and the Danish National Environmental Research Institute (NERI) and based on background papers prepared by ICIS and NERI, Oxford University and Sustainable Europe Research Institute (SERI), and EEA European Topic Centres. An Advisory Group is in place to support the work and a first draft is expected in June 2004</p> |
| <p><i>SR2: Environmental aspects of enlargement</i></p> <p>A process addressing the environmental consequences of EU enlargement, both for current EU countries, new member countries and for the region as a whole, in preparation for the Accession May events, consists of 8 background papers focusing on:</p> <ul style="list-style-type: none"> • Integration of policies and <i>acquis</i> implementation in candidate countries • <i>Acquis</i> implementation in acceding countries and its implications on state of the environment • Industry and introduction of new technologies in relation to enlargement process • Main aspects of economic restructuring (general, agriculture, industry, transport, energy) • Threats to biodiversity from pollution of water and air and consequences of <i>acquis</i> implementation. • Use and management of land to improve the state of biodiversity • Use of instruments and policy options to achieve the biodiversity preservation goals • Quality of life in EU candidate countries and differences with Member States <p>An Advisory Group is in place to support the work and first results are expected for March 2004</p> |
| <p><i>SR3: Halting the loss of biodiversity</i></p> <p>The main focus of this sub-report is to assess the progress towards the target of the EU 6th Environment action programme (6EAP) of halting the loss of biodiversity in Europe ('The 2010 biodiversity target'). The report aims at presenting the state and trends of (certain) elements of European biodiversity in relation to major pressures and analyse the most important European policies and instruments of relevance for biodiversity. The focus will be on problem areas and policies highlighted in the 6EAP. The report will be a first analysis of progress – and lack of progress – towards the 2010 biodiversity target. An Advisory Group is in place to support the work and first results are expected between June and September 2004.</p> |
| <p><i>SR4: Sustainable use and management of natural resources</i></p> <p>Relating to the 6th EAP priority area on Sustainable use and management of natural resources this report will analyse and assess the effectiveness of policies in EEA member countries in a n integrated way, focussing on an array of selected topics referring to materials (waste), and resources (forests, fisheries, water). Efficiency and decoupling will be central concepts to this report. An extra-subvention has been given to the ETC-WMF to prepare this sub-report. An inception meeting was held mid February 2004. An Advisory Group is not in place yet and first results will be delivered September 2004.</p> |
| <p><i>SR5: Policy integration</i></p> <p>A stocktaking exercise on ongoing external activities pointed to the need of a thorough scoping and consultation activity. A contract has been already concluded with IEEP that provides EEA with the support for this 'scoping', the subsequent development of a work strategy, the organisation of workshop(s) and report drafting.</p> |
| <p><i>SR6: Climate change, Air Quality and sustainable energy</i></p> <p>The report analyses current societal and sectoral developments, which have led to increasing emissions of greenhouse gases and the current and projected progress towards achieving the Kyoto Protocol emission commitments and the progress in key existing EU and Member States' policies and measures by 2010. A key feature of the report will be an analysis of a potentially sustainable European energy system by 2030. In addition a separate second part of the report will analyse the expected co-benefits of long-term climate change objectives on air pollutant emissions and air quality by 2020, and thus reduced adverse impacts on human health and ecosystems. An Advisory Group is being put in place and first results are expected for March 2004</p> |
| <p><i>SR7: European Environment Outlook</i></p> <p>The aim of this sub-report is to address European Environment Outlooks in an integrated manner. It will focus both on the mid-term (up to 2020 / 2030) and long-term (beyond 2020 / 2030) perspective on environment issues - combining to some degree quantitative and qualitative analysis. The sub-report will link the information covered by several other sub-reports. The objective is to provide an integrated prospective analysis across a variety of themes and sectors (i.e. air and climate change, energy, transport, agriculture, industry, wastes and material flows, water use and quality, terrestrial environment and land-use as well as biodiversity), relying on a coherent and consistent set of assumptions and methodological approaches. An Advisory Group/ Expert Panel is being put in place</p> |

SR8: Europe's Environment and the Global Dimension

The report will illustrate the magnitude of EU/global interactions, taking into consideration sustainability features such as global responsibility, distributional equity, adaptability and security, decoupling. Trade and Environment appears as a central issue covering the question of flows of goods and services (footprint), the development of environmental standards, damaging subsidies, responsible investments as main themes for a debate on global governance. An Advisory Group is not in place yet, but a Workshop/seminar is foreseen in the second half of 2004.

SR9: Environment and health

A process referring to EEA participation in the Ministerial Conference on Health and Environment, Budapest, June 2004 and addressing the 6EAP priority area Environment and Health and Quality of life. Subsequent to this major event a report is foreseen to be produced

SIGNALS 2004 is being prepared at EEA, in a different format than used previously, and will be launched in May 2004. A more concise format, focused on a small amount of indicators and messages, has been developed. Also a functional report link has been established with the newly established CSI (the two basic CSI documents are presented in Annex II A: List of proposed EEA Core set of indicators – 2004 and Annex II B: Criteria for the selection of the EEA core set of indicators). Experiences and feedback from this new edition will shape the production of future editions.

The CSI, endorsed by the EEA Management Board on 9 March 2004 and presented in Brussels to Commission services on 22 March, is a set of priority indicators (and associated data-flows) and one of the main products of EEA. Future CSI developments, associated with policy cycle and reporting needs, have to be planned and have to be made operational in the year to come.

The EG-IRG will be used as a forum for getting feedback on SIGNALS, to support development of the SOER2005, and for contributing to reviews of the CSI.

2. Purpose and contents of the contract

To establish a framework contract with a service provider who can provide broad support to the various EEA crosscutting assessments and related tasks and projects, namely state of the environment reporting and indicator-related activities.

Specific projects/assessments to be developed under this frame, in an integrated way, will be object of several specific agreements, to be determined, and will cover:

- State of the Environment and Outlook Report 2005 (SOER2005)
- Support to the Expert Group on Indicators and Reporting Guidelines (EG-IRG)
- Annual Signals report (EEA SIGNALS)
- Development and maintenance of a Core Set of Indicators (CSI)

Other priorities of the EEA Strategy 2004-2008, like sectoral assessments, policy effectiveness analysis, scenarios and prospective studies, as well as the work under the Sustainable Development and Enlargement Agendas (not to mention the issues-driven assessments) will be used as input material for the projects listed above.

3. Description and objectives of the contract

Taking into account the priorities in the current and coming EEA work programmes, and the expertise currently available in the EEA and in its EIONET network (in particular

European Topic Centres) expertise is being sought to support the development of the EEA's state of the environment related activities scheduled for 2004-2005.

This consultancy is intended to support the production of main EEA products, namely:

- The development, writing and publication of the SOER2005 (more information on state of the environment reporting can be downloaded from http://reports.eea.eu.int/search_results?SearchTitle=State+of+the+environment+reports)
- The development, writing and publication of the Signals 2005 and 2006 (more information on the Signals series can be downloaded from http://reports.eea.eu.int/search_results?SearchTitle=Signals)
- Review and update activities for the CSI (more information on EEA indicators can be downloaded from <http://themes.eea.eu.int/indicators>), namely the preparation of a manual on CSI implementation and support to review process with EEA clients
- Support methodological indicators development including distance to target analysis, country benchmarking, indicators that integrate data across the environmental, social and economic dimensions of Sustainable Development
- Run the associated activities of the Expert Group on Indicators and Reporting Guidelines (EG-IRG), as well as support EEA in framing reporting and indicators activities post-2005 (namely considering the pan-European 2007 report under the 'Environment for Europe process' – more information on this report can be downloaded from http://reports.eea.eu.int/environmental_assessment_report_2003_10/en)

4. Purpose of the call for tender

To establish a framework contract, and subsequent specific agreements, with a service provider that can provide broad support to the EEA's various activities under regular crosscutting assessments, state of the environment reporting and indicator related activities, namely:

- Finalise a first draft of SOER2005 in 2004, under the lead of the respective EEA Project Manager.
- Finalise SOER 2005 in 2005, under the lead of the respective EEA Project Manager.
- Produce an edition of Environmental Signals under the lead of the respective EEA Project Manager in 2005.
- Produce an edition of Environmental Signals under the lead of the respective EEA Project Manager in 2006.
- Design and support the EEA on the test-run of the EEA Core Set of Indicators in 2004-2005, prepare a CSI manual, as well as design and develop the first up-date of the EEA-CSI, under the lead of the respective EEA Project Manager.
- Run activities of the expert group on indicators and reporting guidelines (two meetings of the expert group for 2004 and two meetings in 2005) under the lead of the respective EEA Project Manager.
- Support EEA in framing reporting and indicator activities post-2005 (namely considering the pan-European 2007 report under the 'Environment for Europe process').

5. Tasks

In 2004, the work will essentially be focused (from a proposed outline for the SOER2005 to be developed) on preparing a first draft for the SOER2005 (based on SR in preparation but also including data gathering and use of core set of indicators development), as well as on planning the editorial, communication, and consultation tasks required. Preparation and running of 2 meetings of the Expert Group (EG-IRG) is expected. On the CSI, after the endorsement of the Core Set of Indicators by the EEA Management Board on 9 March 2004, both the test-run and the manual shall be prepared in 2004. With reference to Signals 2005, the planning of this publication shall occur also in 2004, based on collected and processed information on the 2004 edition. Shaping EEA reporting activities after 2005 shall also start in 2004, on a scoping basis, eventually through the organisation of a workshop. All these activities should be understood as interdependent and synergistic. More detailed tasks as well as respective times-table will be defined in each Specific Agreement. Broadly, the tasks can be defined as:

- a. Preparing (writing) of SOER2005 chapters based on Sub-reports being prepared by EEA for the state of the environment and outlooks report, as well as other information produced by EEA and collected complementary information, as required;
- b. Supporting the further development of the Signals indicator based report and related environment indicators and indicator fact-sheets;
- c. Supporting the further development of the Core Set of Indicators, designing the up-date methodology and support the carrying of the test-phase. Establish the necessary linkages with indicator fact-sheets and data-flows;
- d. Providing data, methodological and assessment support to the Agency on the previous products on impacts and effectiveness of environmental and sectoral policy instruments and measures;
- e. Support to networking activities on the supra mentioned domains, namely through the EG-IRG, as well as other related experts, organisations and authorities throughout Europe;
- f. Contributing to EEA activities regarding stocktaking of experiences and follow-up of relevant international and national initiatives in these domains.

These tasks are to be developed in close cooperation with EEA Project Managers, the European Topic Centres, and other consultants.

The offer should express the consultant's views, experience and insights on the tasks described above, as well as an overall methodology to support EEA on efficiently and timely succeeding to deliver the mentioned products.

The broader requirements for the projects being developed by the EEA under this call will determine the numbers of days and staff expertise to be allocated to each specific agreement that will be concluded under this framework contract.

6. Expertise

To support the above activities, the contractor is expected to provide a wide range of expertise, in particular on the integrated assessment of pressures/impacts of socio-economic

sectors, and should be familiar with issues of environmental analysis and relevant policies. In addition, expertise will also be required regarding wider sustainability concerns.

Networking and building on diverse expertise is an essential part of the tasks. Therefore, the formation of a consortium reflecting the wide geographical European scope of the EEA member countries - including east, south, north, west - is encouraged. In terms of geographical coverage, all EEA member countries are included. Moreover, experience from elsewhere should be taken into account where appropriate.

The consortium's size should, however, be limited to keep the work easily manageable (e.g. 2-4 firms, groups or services providers).

Expertise will differ to accomplish each one of the tasks listed in point 5, as well as within the completion cycle of each of the tasks, from a more senior assessment driven expertise for SOER2005 to a more junior one on the run of the EG-IRG. The tender should provide a grid of proposed expertise according to each task proposed.

7. Organisation and location of work

The contractor will have to work closely with the EEA staff and the European Topic Centres (ETC).

The main part of the work can be executed from the contractor's offices, with very regular contacts with the relevant EEA Project Managers. Periods of *intra-muros* short-term work (up to 14 days) at the EEA have to be foreseen.

Due to the type of tasks involved and the delivery timing as broadly shown in point 8 it is expectable that 4 to 5 people should be working with EEA at the same time from September 2004 to June 2005.

8. Time schedule

The framework contract will run over a period of two years (24 months) following its signature, with the possibility to renew it twice for a period of one year, its maximum duration being limited to 4 years.

The work activities are to be detailed in specific agreements and the respective timetable will be agreed in discussion with the respective EEA Project Manager. Nevertheless, the work concerning the first specific agreement should start no later than the first week of July.

Although a detailed timetable will be prepared for each of the projects which are the object of a specific agreement, a global timetable for the overall framework contract is expected to be as follows:

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| Within two weeks after signing of the framework contract and first specific agreement | Kick-off meeting with EEA project manager in Copenhagen to put to work the technical specifications of the first specific agreement (SOER2005) |
| Within two weeks after signing of the framework contract – signing of second specific agreement on EG - IRG | • Kick-off meeting with EEA project manager in Copenhagen to put to work the technical specifications of the |

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| | <p>second specific agreement</p> <ul style="list-style-type: none"> • Prepare meeting of EG-IRG and plan background papers |
| No later than two months after signing of framework contract and first specific agreement | <ul style="list-style-type: none"> • Progress on collection of materials from SRs • Progress on identifying relevant information sources • Gap analysis and proposal to fill the gaps • Consolidated table of contents of SOER2005 |
| No later than two months after signing of the framework contract – signing of third specific agreement on Core Set of Indicators | Kick-off meeting with EEA project manager in Copenhagen to put to work the technical specifications of third specific agreement (CSI) |
| No later than two months after signing of the framework contract | Start preparation of expert workshop on EEA reporting activities after 2005 |
| No later than three months after the signing of the framework contract | <ul style="list-style-type: none"> • Delivery of the extended outline for SOER2005 (storylines and main indicators) • Preparations for a first round of consultation |
| No later than three months after the signing of the framework contract – signing of the fourth specific agreement on SIGNALS | Kick-off meeting with EEA project manager in Copenhagen to put to work the technical specifications of fourth specific agreement (SIGNALS) |
| No later than four months after the signing of the framework contract | <ul style="list-style-type: none"> • EEA internal review of a pre-draft SOER2005 • Progress meeting to discuss detailed timetable for 2005 |
| No later than four months after the signing of the framework contract | Prepare meeting of EG-IRG and plan background papers |
| No later than five months after the signing of the framework contract | Pre-draft of SOER2005, including comments from EEA review and first consultation |
| No later than 6 months after the signing of the framework contract | Delivery of draft SOER2005 to EEA, format edited |
| No later than 8 months after the signing of the framework contract | <ul style="list-style-type: none"> • Delivery of the pre-final SOER2005 to EEA • Round of consultation with EIONET and stakeholders prepared to be launched |
| No later than 10 months after the signing of the framework contract | <ul style="list-style-type: none"> • Integrate comments and recommendations from round of consultation into final draft SOER2005 • Draft summary of SOER2005 |
| No later than 11 months after signing of framework contract | <ul style="list-style-type: none"> • Final SOER2005 (English) • Final Summary SOER2005 (English) |
| No later than 14 months after signing of framework contract | Project plan on exploration of SOER2005 results (web products etc.) |

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| No later than 16 months after signing of framework contract | Prospect discussion report and plan on future EEA reporting and indicator-related activities after 2005 |
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9. Reports and documents to be submitted

The reports and other products to be provided by the contractor, and their timing, will be detailed in the specific agreements.

The reporting language is English. The word processor should be Word. Data are exchanged as Excel spreadsheets and/or as databases compatible with the EEA data warehouse system. All materials are to be delivered in a format compatible with the EEA computer system.

EEA shall provide the contractor with guidelines on writing styles and formatting of the outputs required.

10. Prices

The contractor will be expected to offer the services at daily rates (in EURO per day) according to the levels of expertise and experience offered (i.e. senior and junior contractor). Travel and subsistence expenses likely to be incurred in the course of execution of the contract (for short-term missions to EEA and elsewhere) are to be excluded from these daily rates and indicated separately.

Travel and subsistence costs for *short-term* missions to EEA or elsewhere shall be agreed under the specific agreements and shall be reimbursed in accordance with the rules and conditions relating to the payment of mission expenses in force at the EEA.

In addition, although not expected, daily rates have to be given for *long-term* periods of *intra-muros* work at the EEA's premises in Copenhagen (more than 14 consecutive days). These need to specify the daily fees and travel/subsistence costs (as calculated by the contractor) separately.

The tender shall provide information on daily fees as specified above in the format below, for each type of expertise identified and for each project package, i.e. A) SOER2005, B) support to EG-IRG, C) SIGNALS, and D) CSI:

| Price information to be included in the tender | | | | |
|--|--|------------------------|--|-------------------|
| Task A Type of expertise I | Extra-muros work, missions & short term intra-muros work (< 2 weeks) | | Long term intra-muros work (> 2 weeks) | |
| | Junior consultant | Senior consultant | Junior consultant | Senior consultant |
| Daily fee (EUR/day) excluding travel | | | | |
| Travel/subsistence costs (EUR/day) | According to EEA rules | According to EEA rules | | |

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|--------------------------------------|--|------------------------|--|-------------------|
| Task A Type of expertise II | Extra-muros work, missions & short term intra-muros work (< 2 weeks) | | Long term intra-muros work (> 2 weeks) | |
| | Junior consultant | Senior consultant | Junior consultant | Senior consultant |
| Daily fee (EUR/day) excluding travel | | | | |
| Travel/subsistence costs (EUR/day) | According to EEA rules | According to EEA rules | | |

In drawing up the bid, the tenderer should bear in mind the provisions of the General terms and conditions applicable to contracts awarded by the EEA and of the draft framework contract and specific agreement.

11. Selection criteria

Tenderers must provide the following documentation:

Legal position

- Identification sheet (Annex III) duly filled out and signed;
- Copy of inscription in trade register, where applicable;
- Copy of inscription in VAT register.

Economic and financial capacity

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

Exclusion criteria

The tenderer shall provide an auto-declaration, preferably made on oath before a judicial or administrative authority, a notary or a competent professional or trade body by a person competent to do so on behalf of the tenderer, which states that none of the grounds for exclusion (please see General terms and conditions applicable to contracts, Art. 2 (2)) apply to the tenderer.

Technical capacity

- A list of comparable services and projects performed over recent years;
- Detailed CVs of the tenderer, in particular those of the person or persons responsible for providing the services. Tenders from consortiums of firms or groups of service providers shall specify the role, qualifications and experience of each member or group;

- Information on the tenderer's working languages and proof of the tenderer's ability to submit edited reports in English;
- An indication of the proportion of the contract, which the tenderer may intend to subcontract.

Tenders will lapse: 9 months after the final date for receipt of tenders.

12. Contract awarding criteria

The contract will be awarded to the most economically advantageous tender in terms of the following criteria:

- Proven experience and good knowledge of policies, sectoral integration and sustainable development, data, information sources and State of the Environment assessments at the European level (15 points);
- Proven track record of similar activities at the European level, i.e. competence of the working team and capacities to offer expertise on a broad range of assessment frames, and proof of delivery of high quality outputs at EU level, namely successful and land marking publications (30 points);
- Composition of the team or consortium, which should reflect the wide geographical area of all EEA member countries (north-south-east-west) and cover the broad type of activities to be performed, as well as good networking capacities throughout Europe (10 points);
- Proven experience on methodological indicator development including distance to target analysis, country benchmarking, indicators integrating data across the environmental, social and economic dimensions of Sustainable Development (15 points);
- Excellent writing skills, English editing, and experience in reporting for policy support purposes, and targeted audiences (30 points).

Provided a minimum of 70 points are achieved, the tender offering the best value for money will be the one which receives the highest score when the total number of points awarded is divided by the average value of the daily fees for senior and junior consultants for *extra-muros* work.

13. Contract details

The winning tenderer will be awarded a framework contract for two years with the possibility of renewal twice, provided that the criteria in the call for tender are constantly met.

Specific agreements will be issued under the framework contract as and when needed. It is expected that the first specific agreement will be awarded on signature of the framework contract.

Terms of payment will be agreed in the specific agreements that will be concluded under the framework contract.