
TENDER SPECIFICATIONS

OJ/2008/04/11 - PROC/2008/006

“Evaluation of the public health benefits of partner notification”

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1. What is the ECDC?

The European Centre for Disease Prevention and Control (ECDC) was established by the European Parliament and Council Regulation 851/2004 of 21 April 2004 to identify, assess and communicate current and emerging threats to human health from communicable disease. Within this broad mission statement, the main technical tasks of the Centre fall into the following four categories:

1. Scientific opinions, bringing together technical expertise in specific fields through its various EU-wide networks and via ad hoc scientific panels;
2. Technical assistance and communication about its activities and results, and disseminating information tailored to meet the needs of its different audiences;
3. Epidemiological surveillance and networking of laboratories, i.e. the development of epidemiological surveillance at European level and the maintenance of networks of reference laboratories;
4. Early Warning and Response based on 'round the clock' availability of specialists in communicable diseases.

Details of the Centre's mandate and functions are set out in the above referenced Regulation, accessible through the ECDC web site < <http://www.ecdc.europa>. >.

2. What is a tender?

For its organisation and functioning the ECDC is in constant need of goods and services. 'Tendering' is the structured way to consult the market for the purchase of these goods and services.

The purpose of competitive tendering for awarding contracts is two-fold:

- to ensure the transparency of operations;
- to obtain the desired quality of services, supplies and works at the best possible price.

The applicable regulations, namely directives **92/50/EEC**, **93/36/EEC** and **93/37/EEC**, oblige the ECDC to guarantee the widest possible participation, on equal terms in tender procedures and contracts.

3. What is the tender about?

ECDC wishes to engage the services of a company, organisation or consortium for performing an analysis of policies, practices, barriers and outcomes in partner notification in EU countries. The study has to cover HIV, other STI (both bacterial and viral), hepatitis B and C. Notification of partners in the case of sharing of drug equipment is to be included.

The analysis aims at an evaluation of the public health benefits of partner notification. It will serve as reference material for ECDC advice activities to Member States.

4. Who can participate in this tender?

This procurement procedure is open to any natural or legal person wishing to bid for the assignment and established in the EU, the EEA, and ECDC partner country or any other country covered by the WTO Government Procurement Agreement¹.

¹ More information can be found at the following link: http://www.wto.org/english/docs_e/legal_e/legal_e.htm#procurement

Section B – Guidelines and general information related to this tender

1. What should my offer consist of?

Tenderers must submit an offer that comprises of the following **3** elements:

A. Technical proposal

The technical proposal must be consistent with the terms of reference and contain all information requested in **sections C.2. and C.3.** In preparing the technical proposal you should bear in mind the award criteria against which it will be evaluated, see **section C.7.**

B. Financial proposal

The financial proposal must include a detailed financial breakdown based on the format found in **section D.4.** Prices must be quoted in EURO using the conversion rates published in the C series of the Official Journal of the European Communities on the day when the invitation to tender was issued. This information is also available on the Website of the European Central Bank at the following URL:

<http://www.ecb.int/stats/eurofxref/>.

The tenderer is responsible for the proper application of the rules on taxes, duties, charges (including VAT) at the place where he is taxable. Prices must be quoted free of all duties, taxes and other charges (including VAT) as the ECDC is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Communities.

C. Supporting documentation

The supporting documentation is an important part of your offer and must be complete to guarantee that your technical proposal will be evaluated. The supporting documentation must contain the following **4** elements:

- *Eligibility documents*

Documents proving that the tenderer is eligible to tender for this contract must be provided. Information on these documents can be found in point **B.5.1** below.

- *Selection criteria documentation*

All documentation requested in **section C.6.**

- *Tenderer administrative information*

This information is necessary to allow the ECDC to produce the contractual documentation in the event you are awarded the contract. This information is particularly important for payments, since payments will be made by bank transfer to the account indicated by the tenderer in the standard forms. The standard forms to be used can be found in **section D.2.**

- *Checklist*

The checklist found in **section D.5.1** must be included as a cover page of your technical proposal.

2. Contacts between ECDC and the tenderer

2.1 Written clarification before the closing date for submission of tenders

Requests for clarification regarding this procurement procedure or regarding the nature of the contract can be sent by mail, fax or email to:

ECDC

Attn: Procurement

171 83 Stockholm, Sweden

Address for visits: Tomtebodavägen 11a, Solna, Sweden

Fax: +46 (0) 8 586 01 10 01

Email: procurement@ecdc.europa.eu

The deadline for clarification requests is indicated in the timetable under **section C.1**. Each request for clarification sent to ECDC should indicate the PROC reference number and the title of the tender.

ECDC will provide additional information resulting from the request for a clarification in the following way:

- If you have requested the tender documentation by email, fax or by mail, you will receive written clarifications by email or by fax.
- If you have downloaded the tender documentation from the ECDC web site then you should check regularly the following URL address where the written clarifications will be available for download: <http://www.ecdc.europa.eu>

In case ECDC discovers an error, a lack of precision, an omission or any other type of clerical defect in the text of the contract notice or in the tender specifications, ECDC will inform candidates at its own instance.

2.2 Oral clarification before the closing date for submission of tenders:

Where a site visit at ECDC's premises or a meeting is deemed necessary before the closing date for submission of tenders in order to clarify certain aspects of the tender, the ECDC shall make the necessary arrangements and inform or invite candidates. The costs incurred in attending shall be borne by the tenderer. The ECDC may, however, decide that the query would be more efficiently dealt with by means of a written clarification.

In case a meeting or visit is taking place, the dates are indicated in the timetable under **section C.1**.

2.3 Contacts between ECDC and tenderers after the closing date for submission of tenders.

If, after the tenders have been opened, some clarification is required in connection with a tender, or if obvious clerical errors in the submitted tender must be corrected, the ECDC may contact the tenderer, although such contact may not lead to any alternation of the terms of the submitted tender.

3. Can I offer something that varies from what is requested in the terms of reference?

In the absence of any such indication in the tender specifications your offer should not deviate from the services requested.

4. Can a consortium of companies submit an offer?

Joint offers from consortia of service providers are permitted provided that conditions for adequate competition are observed. The consortium must clearly indicate which service provider will be carrying out which tasks as well as who has been appointed by the others as the lead partner.

5. Do I comply with all formal requirements to be eligible for tendering?

5.1 Exclusion criteria

Tenderers shall be excluded from participation in a procurement procedure if:

- (a) (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) (b) they have been convicted of an offence concerning their professional conduct by a judgment which has the force of *res judicata*;
- (c) (c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- (d) (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) (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 Communities' financial interests;
- (f) (f) 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.

The ECDC shall accept as satisfactory evidence that the candidate or tenderer to whom the contract is to be awarded is not in one of the situations described in point (a), (b) or (e) above, a recent extract from the judicial record or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. The ECDC shall accept, as satisfactory evidence that the candidate or tenderer is not in the situation described in point (d) above, a recent certificate issued by the competent authority of the State concerned.

The contract shall not be awarded to candidates or tenderers who, during the procurement procedure for this contract:

- (a) are subject to a conflict of interest;
- (b) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or fail to supply this information;
- (c) find themselves in one of the situations of exclusion listed above.

Tenderers must certify that they are not in one of the situations listed above by signing the attached Exclusion Criteria & Non Conflict of Interest Form (see **section D.1**)

6. Confidentiality & public access to documents

In the general implementation of its activities and for the processing of tendering procedures in particular, ECDC observes the following EU regulations:

- EU Council Directive 95/46 of 24 October 1995 and EU Council Regulation 45/2001 of 18 December 2000 on the protection of individuals with regard to processing of personal data by the Community institutions and the free movement of such data.
- EU Council regulation 1049/2001 of 30 May 2001 regarding public access to European Parliament, Council and Commission documents.

7. Where do I find the standard provisions ECDC applies in its contracts?

In drawing up your offer, you should bear in mind the provisions of the draft Framework Contract (see **section E**). In particular, the draft contract indicates the method and the conditions for payments to the contractor.

Submission of a tender implies acceptance of all the terms and conditions set out in the invitation to tender, in the specification and in the draft contract and, where appropriate, waiver of the tenderer's own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.

8. May ECDC request a financial guarantee from the Contractor?

ECDC may require a pre-financing guarantee or a performance guarantee from the Contractor chosen as a result of this tendering procedure. When such guarantee is requested, the specific conditions related to the provision of a guarantee are included in the draft contract (**section E**). The costs for the guarantee shall be borne by the Contractor.

9. How should I report on my progress?

In order to ensure that public funds are being spent correctly, the Contractor chosen as a result of this tendering procedure may be required to submit reports on the progress of the assignment. If applicable, the nature and frequency of these reports is detailed in the terms of reference (see **section C.3**).

10. How and when should I present my offer?

Both the technical proposal and the financial proposal should be signed and perfectly legible in order to rule out any ambiguity.

10.1 Language

Offers must be submitted in one of the official languages of the European Union. ECDC prefers however to receive documentation in English, although this does not constitute a selection nor award criteria and will be ignored for the purposes of considering the tender.

10.2 Dates and postal address

The offer should be postmarked not later than the date indicated in the timetable in **section C.1** or submitted by hand not later than **16.00 hrs** of the date indicated in **section C.1**.

The offer is to be submitted to the following address:

ECDC

Attn: Procurement

171 83 Stockholm, Sweden

Address for visits: **Tomtebodavägen 11a, Solna, Sweden**

10.3 Double envelope system

Offers must be submitted in accordance with the **double envelope system**,

The **outer envelope or parcel** should be sealed with adhesive tape and signed across the seal and carry the following information:

- the reference number of the invitation to tender **OJ/2008/04/11 - PROC/2008/006**
- the project title "Evaluation of the public health benefits of partner notification"
- the name of the tenderer

- the indication “Offer - Not to be opened by the internal mail service”.
- the address for submission of offers (see above)
- the date of posting (if applicable) should be legible on the outer envelope

The **three innermost envelopes** are:

Envelope A, containing one original (unbound, signed and clearly marked as “Original”) of the **Technical Proposal** and four copies (bound and each marked as “Copy”).

Envelope B, containing one signed original and four copies of the **Financial Proposal**.

Envelope C, one original copy of the **supporting documentation**.

For the Case implementations for Specific Contracts (from Section F), additional separate envelopes An and Bn need to be added, with the same principle, within the outer envelope or parcel, as indicated in Section D.5.

10.4 Confirmation of offer submission

In order to keep track of offers due to arrive, tenderers who do not hand deliver their offers are requested to complete and return the form found in **section D.6**.

1.1 How will my offer be evaluated?

Offers are opened and evaluated by a committee, possessing the technical and administrative capacities necessary to give an informed opinion on the offers. The committee members are nominated on a personal basis by the ECDC under guarantee of impartiality and confidentiality. Each of them has equal voting rights.

10.5 Offer opening session

The main aim of the opening session is to check whether the offer received is compliant with the following formal requirements:

- ✓ Not submitted later than the submission deadline
- ✓ The envelope containing the offer is sealed
- ✓ Written in an EU language
- ✓ Signed
- ✓ Contains a technical and financial proposal and supporting documentation
- ✓ Submitted in the number of copies required

The offer opening session will take place on the date indicated in the timetable in **section C.1** at the premises of the ECDC. Tenderers wishing to attend the opening session should send a confirmation by fax to “Procurement” on fax +46 (0)8 586 01 001 no later than 24 hours before the opening. Maximum one representative per tenderer may attend the opening session and their participation will be restricted to an observer role.

10.6 Offer evaluation session

Offers complying with the formal requirements checked during the offer opening session will be evaluated in two stages:

1. The evaluation committee first discusses the eligibility and capacity of the tenderer to perform the contract in view of the Selection Criteria as defined in **section C.6**. If one of the relevant criteria listed under the Selection Criteria is not positive, the offer may not be further evaluated.

2. Each committee member evaluates the technical proposal and awards a score against the Award Criteria in section C.7. Weighting the technical quality against the price, the economically most advantageous offer is established.

The offer evaluation procedure is confidential. The evaluation committee's deliberations are held in closed session and its decisions are collective. The members of the evaluation committee are bound to secrecy.

The evaluation reports and written records are for official use only and may not be communicated to the tenderers nor to any party other than the ECDC, the European Anti-Fraud Office and the European Court of Auditors.

10.7 Interviews

If interviews are required for this tender then the date will be indicated in **section C.1**. If no date is indicated then this implies that no interview is necessary.

The costs for attending the interview shall be borne by the tenderer.

1.2 Other information

Tenderers are expected to examine carefully and respect all instructions and standard formats contained in these specifications and the invitation to tender. An offer, which does not contain all the required information and documentation, may be rejected.

The tenderer shall be bound by his offer for a period of 6 months following the closing date for submission of offers.

Where a maximum budget is mentioned in the terms of reference, any tenderer submitting a financial proposal exceeding this budget will be rejected.

All documents presented by the tenderer become the property of the ECDC and are deemed confidential.

ECDC will not reimburse expenses incurred in preparing and submitting offers.

Completing the adjudication or the procedure of the call for tenders in no way imposes on the ECDC an obligation to award the contract. The ECDC shall not be liable for any compensation with respect to tenderers whose offers have not been accepted, nor shall ECDC be liable when deciding not to award the contract.

Each tenderer will be informed in writing about the outcome of the call for tender.

Section C – Specific information related to this Tender

1. Timetable

The timetable for this tender and the resulting contract(s) is as follows:

OJ/2008/04/11 - PROC/2008/006

“Evaluation of the public health benefits of partner notification”

Summary timetable		Comments
Launch date	11/04/2008	Dispatch of contract notice to the OJ
Site visit or clarification meeting (if any)		Not applicable for this tender
Last date on which clarifications are issued by ECDC	03/06/2008	
Deadline for submission of offers	10/06/2008 at 16.00 hours	
Interviews (if any)		Not applicable for this tender
Opening session	17/06/2008 at 10.00 am	
Date for evaluation of offers	23/06/2008	Estimated
Notification of award to the selected tenderer	evaluation date plus 1 weeks	Estimated
Contract signature	evaluation date plus 3 weeks	Estimated

2. Terms of reference for Framework Contract

Evaluation of the public health benefits of partner notification

2.1 Introduction

The European Centre for Disease prevention and Control (ECDC) was established by the European Parliament and Council Regulation 851/2004 of 21 April 2004 to identify, assess and communicate current and emerging threats to human health from communicable disease. Within this broad mission statement, the main technical tasks of the Centre fall into the following four categories:

- Scientific opinions, bringing together technical expertise in specific fields through its various EU-wide networks and via ad hoc scientific panels;
- Technical assistance and communication about its activities and results, and disseminating information tailored to meet the needs of its different audiences
- Epidemiological surveillance and networking of laboratories, i.e. the development of epidemiological surveillance at European level and the maintenance of networks of reference laboratories
- Early Warning and Response, based on 'round the clock' availability of specialists in communicable diseases.

Details of the Centre's mandate and functions are set out in the above referenced Regulation, accessible through the ECDC web site <http://www.ecdc.europa.eu>

2.2 Tender specifications

ECDC wishes to conclude a framework contract. The duration of this contract is planned as 2 years, plus other two years renewable annually. The tenderer's offer should be accompanied with a technical proposal and a financial proposal for the framework contract. Concurrently, the tenderer's offer should be composed of offers of specific contracts related to the lots indicated in the cases for price setting, each one composed also of a technical proposal and a financial proposal. The specific contracts are designed to be implemented starting in 2008 and be completed by June 2009 (see Section F and Section G).

The purpose of these Terms of Reference is to give instructions and guidance to candidates about the nature of the offer they will need to submit and to serve as the contractor's mandate during project implementation. The Terms of Reference ensure that the project will be properly conceived by the contractor, that the work is carried out on schedule and that resources will be properly used.

The Terms of Reference will become part of the contract that may be awarded as a result of this tender.

Background

Partner notification has been practised in European countries since the early 1900s. It is part of the control measures of sexually transmitted infections in many countries. Partner notification is the process in which sex partners of an index case who has been diagnosed with a sexually transmitted infection are informed of their exposure and invited to attend for testing, counselling and/or treatment. Commonly there is a distinction made among:

- patient referral, where the index patient is advised to inform partners;
- provider referral, where the information about the risk of a sexually transmitted disease is carried out by the provider having diagnosed the index case; and
- contract (or conditional) referral, where provider referral is carried out if the index patient is failing to trace and inform his partner after some time.

Partner notification aims at clinical goals (to prevent reinfection of the index patient) and public health goals (to reduce the spread of sexually transmitted diseases). Besides screening, partner notification is the major strategy to reach asymptomatic individuals with a sexually transmitted infection and individuals who do not present to diagnosis, counselling and treatment. The potential benefits of partner notification

include under the public health point of view a decreased onward transmission and a reduced morbidity and mortality, under the clinical point of view decreased reinfection rates in index cases and increased access to therapy for partners. The contribution of partner notification to the clinical and the public health goals have been described in various studies and reviews.

In European countries there is a wide variation in policies and practices as to legal provisions and obligations, range of diseases covered, methods of referral, inclusion in professional guidelines, management of confidentiality issues, partner-information and counselling, the notification process itself (e. g. information-procedures), the follow-up of notified partners (e. g. treatment of partners), monitoring and evaluation of partner notification activities.

ECDC will in the coming years provide scientific guidance documents on key prevention strategies for sexually transmitted infections and HIV. Partner notification is considered as one of the key strategies.

The proposed call for tender calls for completion of a work that will address the need for an evaluation at European level of partner notification in terms of its role as a key prevention strategy, its public health benefits, its limitations and barriers for its use. The evaluation has to take into account the epidemiologic situations and trends in European countries, evolving options for the management of contacts, changes in the role of public-health and health-care providers and the cultural, social, economic and legislative background for disease control measures. The results of the study will enter into ECDC's further activities to provide scientific guidance for the Member States of the EU.

Previous European studies

- A survey aiming at a comprehensive understanding of STI surveillance systems and prevention policies and practices across the European Union was carried by the European Surveillance of Sexually Transmitted Infections Network (ESSTI) between November 2002 and July 2003. The survey was carried out with a structured questionnaire which covered also the approaches to partner notification for sexually transmitted infections. It showed the considerable heterogeneity in approaches to partner notification across the participating Member States and called for the setting of minimum standards for partner notification delivery together with mechanisms to identify and share best practices. (Arthur et al.; *Sexually Transmitted Diseases* 2005; 32: 734-741)
- A survey reviewing national STI-prevention and -control policies and programmes in 45 countries of the WHO European region showed that only part of the Western European countries had a national partner notification policy. (Dehne et al.; *Sexually Transmitted Infections* 2002; 78: 380-384)
- For eastern European countries it was shown that partner notification for *Chlamydia trachomatis* infections is mostly done on a voluntary basis. (Domeika et al.; *Sexually Transmitted Infections* 2002; 78: 115-119)
- The European Study Group on partner notification carried out a study in six European countries on partner notification in recently diagnosed HIV-infected patients and highlighted i. a. the importance of a definition of a relevant partner notification period and the facilitation of partner notification. (QJM – *An International Journal of Medicine* 2001; 94: 379-390)
- The report of the EU-Project “HIV Infection, Contact Tracing and Partner Notification: Development of a new model which would adopt to the European Reality” aims at providing guidelines and the development of procedural algorithms, highlighting i. a. principles which should be observed in partner notification as evidence based approach, integration in wider prevention systems and confidentiality. (Download available at <http://www.giovanniserpelloni.it>)

Selected references

- UNAIDS. The Role of Name-Based Notification in Public Health and HIV Surveillance. Geneva: UNAIDS 2000
- UNAIDS. Opening up the HIV/AIDS epidemic – Guidance on encouraging beneficial disclosure, ethical partner counselling and appropriate use of HIV-case-reporting
- National Institute for Health and Clinical Excellence. NICE public health intervention guidance - One to one interventions to reduce the transmission of sexually transmitted infections (STIs) including HIV, and to reduce the rate of under 18 conceptions, especially among vulnerable and at risk groups.

- Centers for Disease Control and Prevention. Sexually Transmitted Diseases Treatment Guidelines, 2006. MMWR 2006 / Vol. 55 / No. RR-11
- European Guidelines of the International Union against Sexually Transmitted Infections. (Download available at <http://www.iusti.org/regions/europe/euroguidelines.htm>)

3. Implementation reference for Framework Contract

Partner notification is part of the control measures of sexually transmitted diseases in many European countries. There is a wide variation in policies and practices as to the legal provisions, the range of diseases covered, the notification process itself, the account being taken in professional guidelines, the management of confidentiality issues, partner-information, -counselling and -treatment and the monitoring, evaluation and priority setting of partner notification activities.

In the coming years ECDC will provide scientific guidance documents on key prevention strategies for HIV and other sexually transmitted infections (STI). Partner notification is considered as one of the key strategies ([cf. ECDC, Annual Work programme for 2008, page 20](#)).

3.1 Objective

This tender aims at evaluating partner notification of sexually transmitted infections (HIV; other, bacterial and viral STI; hepatitis B and C, also in the context of sharing of drug equipment), at European level, in terms of its role as a key prevention strategy, its public health benefits, its limitations and barriers for its use.

3.2 Types of deliverables

1. Inventory of partner notification policies, legal frameworks, professional guidelines and recommendations,
2. Literature review and list of selected annotated publications and documents,
3. Reports e. g. describing monitoring, evaluation and priority setting, partner notification practices, coverage and outcome, barriers to partner notification and to the referral of notified partners to health services in example populations and countries,
4. Scientific publication on the basis of the above mentioned reports,
5. Outline of an evidence based framework to strengthen the role of partner notification as a key prevention strategy,
6. Expert meetings,
7. Assistance in further development of activities and actions.

3.3 List of proposed activities

Please consider that the list of activities is only intended as a general guide for the tenderer. The tenderer can consider conducting additional or alternative activities to meet the objectives outlined in chapter 3.1. Proposed activities should be clearly stated in the proposal and accompanied with a financial offer related to them.

1. Develop and conduct surveys among EU Member States, professional associations and learned societies to collect information on partner notification policies, legal frameworks, professional guidelines and recommendations.
2. Map partner notification policies and guidelines.
3. Populate structured databases of collected documents.
4. Develop and conduct surveys among EU Member States, professional associations to collect information on partner notification practices.
5. Compare policies and practices.
6. Develop and conduct surveys among EU Member States, professional associations and learned societies to collect information on results and outcomes of partner notification.

7. Perform literature reviews on results and outcomes of partner notification in the EU Member States.
8. Develop and conduct surveys among the Member states, professional associations and learned societies to collect information on barriers to partner notification.
9. Analyze barriers to partner notification and to the referral of notified partners to health services.
10. Identify enabling and supportive factors for partner notification.
11. Write reports on the results of the surveys including on assessment of the public health benefits of partner notification.
12. Meet with ECDC to discuss the results of the activities.
13. Write scientific articles on the results of the surveys.
14. Organize and deliver meetings.
15. Report on meetings.
16. Coordinate activities

3.4 Approach

- Carry out the work in the contractor's own premises/consultants home basis.
- Implement with the guidance by and in agreement with the ECDC through the Head of the Scientific Advice Unit and his delegated staff.
- The collaboration with ECDC is supported by updates on the work progress, information sharing and discussions on a regular basis.
- Gather ECDC input through discussion during scheduled meetings, teleconferences and email exchange.
- Agree a tool for regular communication prior to commencement of works.
- Include the EU and EEA/EFTA Member States in the geographic area of the assignment.
- Clear with ECDC the modalities for approaching Member States, learned societies and professional associations.
- Liaise with other institutions/organisations which are undertaking work that is related to this tender, in order to provide synergy and avoid duplications.
- Collaborate with relevant STI and HIV Networks,
- Obtain support by ECDC in identifying the appropriate contact persons in Member States, learned societies and professional associations to be approached for the mapping of partner notification policies and guidelines.
- Use a multidisciplinary approach.
- Take into account gender aspects in policies, practices, barriers and outcomes.
- Take into account the socio-cultural background and the characteristics of the health systems when reviewing policies and practices.

3.5 Process

For each specific contract, the contractor is requested to:

- present a detailed work plan with timeline, approach and list of milestones and deliverables for the work in the offer, then review these to reach agreement with the Head of Scientific Advice Unit and delegated ECDC staff at implementation inception and at the latest two weeks after the specific contract signature.
- work in close collaboration with ECDC's horizontal programme on HIV, STI and blood-borne viruses and report to the Head of Scientific Advice Unit.

3.6 Expected applicants

Applicants can be a public or a private entity, including a consortium of institutions from different countries, with the following requirements:

- Involvement in public health activities either at local, national or international level
- Expertise on the public health aspects and surveillance of sexually transmitted infections
- Expertise in the evaluation of public health measures

3.7 Profile of the experts

Provide the CVs and clarify how the concerned competences and skills are relevant to the project implementation. There shall also be proven skills in coordination European projects. Relevant multidisciplinary expertise, experience in similar European projects and experience in organising European meetings should be covered.

For all the above, please provide the concerned supporting documentation.

3.8 Budget

The tenderer is expected to provide a detailed budget proposal concerning the costs indicated in Section D.4 , considering also the cases (Section F and below) and their price setting (Section H).

3.9 Payments

The contractor must take into account the following in the preparation and use of the budget:

Payments will be performed as follows:

Payments are performed in relation to deliverables, as provided for in the specific contracts.

3.10 Reporting requirements for each specific contract

The contractor will ensure that the following reports are provided to ECDC in English, within the deadlines stated below:

- **Reports as specified in the “deliverables” of the specific contract.**
- **A final report should be submitted to the ECDC within one month from the completion of the assignment.** This final report should include:
 - a comprehensive technical report on the implementation explaining clearly when, where and how tasks were implemented,
 - the final financial report and all the required supporting documents (including a brief translation in English of eventual invoices/documents in local language),
 - relevant written correspondence, including ECDC’s approval on any item mentioned above.

4. Content of the technical proposal

As described in **section B.1** your offer must consist of three elements. One of these elements is the technical proposal, which must clearly contain the following information.

THE PROPOSAL ON HOW THE TENDERERS OFFERS TO CARRY OUT THE IMPLEMENTATION DESCRIBED IN SECTION C.3

Experience of the team mobilized by the tenderer

Tenderers should give a description of the team from the tenderer that would be working with ECDC. Tenderers should describe how team will be organised and how they will ensure successful organization of services to be rendered.

Specific experience in rendering services as specified in the requested deliverables

Evidence of previous experience in providing such services should be provided.

Modality of delivery of services

Tenderers should describe how they propose to deliver the items requested in Section C.3

Timeliness of service offered

Tenderers should indicate the times required for carrying out each activity/tasks indicated in section C.3.

The technical proposal forms the content of Envelope A (see point B.10.3)

5. Content of the financial proposal

The financial proposal must be based on the format found in **section D.4**

As mentioned in **section B.1**, the ECDC is exempt from all duties, taxes and other charges, including VAT. **For this reason all prices given in the financial breakdown should be free of VAT and other taxes or duties.**

The financial proposal forms the content of Envelope B (see point B.10.3)

6. Selection criteria

The Tenderer must submit evidence of his capacity to perform the contract. The evaluation committee will examine the offers to ensure that the information requested in the selection criteria has been provided and that the Tenderer fulfils all these criteria. Offers which fail to include some of the information requested, may be rejected outright.

In the case of a consortium submitting an offer, each member of the consortium must provide the required evidence. For 'technical capacity' the evidence provided by each member of the consortium will be checked at consortium level to ensure that the consortium fulfils the criteria.

6.1 Economic and financial capacity

The Tenderer must have the following economic and financial capacity to perform the contract:

- The tenderer must be able to prove that he is in a stable financial position.

Evidence of this capacity must be provided by:

- Statements of the undertaking's overall turnover and its turnover in respect of services to which the contract relates for the previous 3 financial years.
- Annual accounts, balance sheet or extracts there from where publication of the balance sheet is required under company law in the country of establishment.

If, for any valid reason, the service provider is unable to provide the references requested by the contracting authority, he may prove his economic and financial standing by any other document which the contracting authority considers appropriate.

6.2 Technical capacity

The Tenderer must document and support that they have the following technical capacity to perform the contract:

- Expertise and experience

A list of your publications related to this call for tender.

Copies of the CVs of the supervisory and other staff proposed by the tenderer to perform the work related to the tender.

Examples of work done in the areas covered by this tender in the past three years; if this work was done in part by subcontractors, tenderers must clearly indicate their own role and contribution.

Tenders presented by consortiums of undertakings or groups of service providers must specify the role, qualifications and experience of each of the members of the consortium or group. In such cases, one of the tenderers must be designated as the main contractor.

- Languages abilities

Statement of the tenderer's language abilities. Most of the work will be performed in English. The tenderer must demonstrate a strong ability to draft and operate in this language and provide examples of previous work.

▪ Technical capabilities

Statement describing the services which can be provided by tenderers (or consortium) directly and those which they plan to subcontract.

Particulars of the consortium, group partners, or subcontractors, already selected by the tenderer which they may use for certain types of work.

Statement of the average annual workforce of the service provider and the size of the management staff during the last 3 years.

Evidence of this capacity must be provided by:

- A presentation of the organisation or consortium and its internal organisation and what organisational changes may be needed to provide services to ECDC.
- A presentation of two recent similar relevant assignments undertaken by the Tenderer.

6.3 Professional capacity

The Tenderer must have the following professional capacity to perform the contract:

- The tenderer must be registered in a relevant commercial or trade register.

Evidence of this capacity must be provided by:

The tenderer must provide evidence of enrolment (declaration or certificates) in one of the professional trade registers, in its country of establishment.

If the tenderer is not required or permitted to enrol in such a register for reasons of his statute or legal status, an explanation should be provided.

7. Award criteria

Once the tenderer has demonstrated the appropriate capacity to perform the contract on the grounds of the selection criteria, the offer will be assessed on the basis of the award criteria.

The award criteria serve to identify the tender offering the best value for money, which will be the one with the best price-quality ratio. The quality of each offer will be evaluated in accordance with the award criteria and the associated weighting. No award criteria and sub criteria others than those detailed below will be used to evaluate the offer.

The tenderer should propose a sound methodology and a realistic work plan to ensure the deliverables are provided in a comprehensive and timely manner. A timeline for reaching the main milestones should be presented. The tenderer will describe the different activities to be undertaken, and specify the methodology to be used and the resources needed.

<p>1. <u>Understanding of the objectives and results required</u></p> <p><i>i) Degree to which proposed services for this tender respond to the tender specifications (such as results, tasks, reporting)</i></p> <p><i>ii) Aptitude in implementing similar European projects experiences</i></p>	<p>30 points</p>
<p>2. <u>Management</u></p> <p><i>i) Proposal of a realistic work plan and implementation plan</i></p> <p><i>ii) How the objectives are met and results produced</i></p> <p><i>iii) Coordination and mobilization of the team</i></p> <p><i>iv) Verifiable objectives and milestones</i></p>	<p>30 points</p>

<p>3. <u>Methodology</u></p> <p><i>i) Characteristics of the practical, scientific and multidisciplinary approach of the implementation</i></p> <p><i>ii) Organization and carrying out the collection of information and data</i></p> <p><i>iii) Linkage with and involvement of key actors in HVI/STI-prevention</i></p>	<p>40 points</p>
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The sum of all criteria gives a sum of 100 points.

Minimum attainment per award criterion

Offers scoring less than 60% for any award criterion will be deemed to be of insufficient quality and eliminated from further consideration.

Minimum attainment overall

Offers scoring less than 60% after the evaluation process will be considered to be of insufficient quality and eliminated from the following phase.

8. Subcontracting

If the tenderer plans to use subcontractors for any part of the work then names and details (e.g. company details or CV of individuals) should be given of these companies or individuals. The subcontractor should also provide a legible copy of any official document showing the legal entity's name, address and registration number given to it by the national authorities.

The tenderer should also describe the arrangements it will put in place to ensure its subcontractors deliver a high quality service to ECDC. Tenderers should also indicate the mechanisms whereby new subcontractors can be identified who will deliver services under the best conditions, notably in terms of value for money.

Section D – Standard Forms

The standard forms are to be completed and provided as part of your offer. Any specific documents required by the forms should also be provided.

1) Exclusion criteria & non conflict of interest 2) Tenderer's administrative data 3) Financial identity forms 4) Financial proposal 5) Checklist 6) Confirmation of offer submission

1. Exclusion criteria & non conflict of interest form



EXCLUSION CRITERIA & NON CONFLICT OF INTEREST FORM

TO BE COMPLETED AND SIGNED BY THE TENDERER

Procurement title:
The undersigned:
Name of the individual/company/organisation:
Legal address:
Registration number:
VAT number:
Name and position of the signatory of this form (authorised to represent the tenderer vis-à-vis third parties and acting on behalf of the aforementioned company or organisation):
.....

In response to your letter of invitation to tender for the above contract, I/we hereby declare that I/we:

- Am/are not in any of the situations excluding me/us from participating in contracts which are mentioned below and I will produce the corresponding certificates if so requested;
- 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 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 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;
- (f) 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.

I/we acknowledge that I/we understand that the contract shall not be awarded to candidates or tenderers who, during the procurement procedure for this contract:

- (a) are subject to a conflict of interest;

- (b) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or fail to supply this information;
- (c) find themselves in one of the situations of exclusion listed above
- Agree to abide by the highest ethical standards in the profession and, in particular, have no potential conflict of interests;
- Will inform the Authority immediately if there is any change in the above circumstances at any stage during the tender procedure or during the implementation of the contract;
- Fully recognize and accept that any inaccurate or incomplete information deliberately provided in this tender may result in my/our exclusion from this and other contracts funded by the Authority.

In the event that my/our tender is successful, I/we undertake to provide the proof usual under the law of the country in which I/we are established that I/we do not fall into the exclusion situations listed in section B.5 of the tender specifications. The date on the evidence or documents provided will be no earlier than 180 days before the deadline for submission of tenders and, in addition, I/we will provide a sworn statement that my/our situation has not altered in the period which has elapsed since the evidence in question was drawn up.

I/we also understand that if I/we fail to provide this proof within 15 calendar days after receiving the notification of award, or if the information provided is proved false, the award will be considered null and void.

Signature of the tenderer or of authorised representative

..... Full name Position Date Signature
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2. Tenderers administrative data

2.1 Address and contact details

Tenderer Name	
Address	
Post Code	
Tel	
Fax	
Email	
Web Site (if applicable)	
Legal Status	
Contact person for this tender	
Legal signatory(ies)	

3. Third party Form - enclosed

4. Financial Proposal for the main call to offer for a Framework Contract

4.1 PRICE SCHEDULE – Evaluation of the public health benefits of partner notification

Company: _____
 Date: _____
 Signature: _____

Please consider that the list of activities in Section C.3.3. is only intended as a general guide for the tenderer. The contractor can consider conducting additional or alternative activities to meet the objectives outlined in Section C.3.1 and the deliverables of Section C.3.2. Proposed activities should be clearly stated in the proposal and accompanied with a financial offer related to them in the price schedule.

Where applicable please provide detailed breakdown such as unit (e.g. person days/hours, items), no of units, times performed (e.g. no of meetings), amount per unit, total amount. All applicable costs need to be detailed in the templates provided.

Activity financial blocks

For the price schedule please use the corresponding Excel sheets for **each** activity (see templates). Annex the filled forms to your offer.

Please describe each activity, indicate the expertise typed applied and its results as related to the deliverables of Section C.3.2.

Please quantify the resources needed in terms of expertise (e.g. days needed for experts) and in terms of other resources needed to achieve the activity and indicate the total lump sum in Euro.

These rates are to be used for the specific contracts. In order to have usable financial blocks, it is requested that the tenderer indicates how the activity financial block can be reproduced/added in order to broaden the scope of the activity. For example, if the activity is given for one country, then the indication will specify that for three countries, it has to be multiplied by three. It is requested to the tenderer also to indicate offered rebate, when the activity is multiplied in such way (e. g. from one to 5 countries, or adding a group of variables to the initial one, or adding a report to the initial one, or other).

Activity financial block for human resources (template)

Activity Description: <i>Detailed quantifiable description of the activity (e.g. indicating the number of countries surveyed etc.). Indicate the expertise typed applied and the outcome of the activity related to the deliverables of Section C.3.2.</i>	Senior Expert		Expert		Junior Expert		Other personal		TOTAL Activity
	Person Days	Total lump sum	Person Days	Total lump sum	Person Days	Total lump sum	Quantity	Total lump sum	Activity lump-sum
	...	...	...	...	...	...	e.g. secretary, documentalist	...	

Activity financial block for other resources/materials/expenditures (template)

ACTIVITY DESCRIPTION (clearly quantifiable specification of the activity)		
RESOURCE/MATERIAL/EXPENDITURE	Quantity	AMOUNT LUMP SUM
.. Description .. (e.g. administrative expenditure, consumables, software)		€
... description ...		€
... description ...		€
...		€
...		€
...		€
...		€
...		€
...		€
...		€
...		€
...		€
...		€
TOTAL Activity other resources/mat/exp		€

Meetings

Offers for meetings are to be made for different locations. The aim is to facilitate comparisons between different locations in Europe, also taking into consideration that meetings might have to be convened outside the tenderers premises. Please use the corresponding Excel sheets and annex the filled forms to your offer.

Please indicate the typical costs per person for meetings in your own premises, in a centrally localised meeting venue in Europe (e. g. Brussels, Paris) and in peripheral meeting location (e.g. Sofia, Bucharest). The principle of the distinction is that for lower income countries in Europe, the offer can have different prices that account for the possibility of a lower costing for the meeting implementation.

As a reference consider the World Bank classification for Europe and Central Asia (http://web.worldbank.org/WBSITE/EXTERNAL/DATASTATISTICS/0,,contentMDK:20421402~pagePK:64133150~piPK:64133175~theSitePK:239419,00.html#Europe_and_Central_Asia).

As to the place of origin please indicate the typical travel costs to the proposed meeting location for short (< 150 km, intermediate (200 to 800 km) and far distances (> 800 km).

Please indicate also the accommodation and subsistence costs per person for a meeting taking place in your premises and at the central/peripheral locations you proposed. Indicate these costs for meetings of 1, 2 and three days duration.

Price list for meetings (template)

Meeting/Location		Origin	Travel Cost from place of origin and return
Per person	<i>own premises</i>	< 150 km	
Per person	<i>own premises</i>	150 - 800 km	
Per person	<i>own premises</i>	> 800 km	
Per person	<i>central</i>	< 150 km	
Per person	<i>central</i>	150 - 800 km	
Per person	<i>central</i>	> 800 km	
Per person	<i>peripheral</i>	< 150 km	
Per person	<i>peripheral</i>	150 - 800 km	
Per person	<i>peripheral</i>	> 800 km	

	Meeting/Location	No. of Days	Accommodation and subsistence cost
Per person	<i>own premises</i>	1	
Per person	<i>own premises</i>	2	
Per person	<i>own premises</i>	3	
Per person	<i>central</i>	1	
Per person	<i>central</i>	2	
Per person	<i>central</i>	3	
Per person	<i>peripheral</i>	1	
Per person	<i>peripheral</i>	2	
Per person	<i>peripheral</i>	3	

Please indicate the price for providing three scenarios: a typical meeting of 15 participants, 30 participants, and 60 participants including own staff, ensuring smooth implementation and ideal working conditions; including all relevant material. Please use a copy of the template to indicate this price for the meeting taking place in your own premises, at a central and at a peripheral location in Europe.

Meeting: own premises, central/peripheral location				
number of participants	15	own premises	central	peripheral
Resource/Material/Expenditure	Quantity	AMOUNT LUMP SUM	AMOUNT LUMP SUM	AMOUNT LUMP SUM
meeting venue	1	€/meeting	€/meeting	€/meeting
personal computer (including software as Windows, office package as power point/Excel/Word, Internet and email connection, DVD)		€/meeting	€/meeting	€/meeting
overhead projector		€/meeting	€/meeting	€/meeting
video projector		€/meeting	€/meeting	€/meeting
laptop for power point		€/meeting	€/meeting	€/meeting
beamer		€/meeting	€/meeting	€/meeting
screens		€/meeting	€/meeting	€/meeting
flip charts (with paper and pens)		€/meeting	€/meeting	€/meeting
microphones and full sounds system (depending on interpretation needs and/or meeting size)		€/meeting	€/meeting	€/meeting

easy access to printer, photocopier (with sorter and stapler function)		€/meeting	€/meeting	€/meeting
Other resource/material		€/meeting	€/meeting	€/meeting
Other resource/material		€/meeting	€/meeting	€/meeting
Other resource/material		...	...	...
coffee breaks and water on the table during meeting;		€/meeting	€/meeting	€/meeting
catering during the meeting		€/meeting	€/meeting	€/meeting
printed material related to the meeting, collected before and during the meeting		€/meeting	€/meeting	€/meeting
relevant administrative, technical and secretarial support		€/meeting	€/meeting	€/meeting
Report on discussion points		€/meeting	€/meeting	€/meeting
Total resources/mat/exp meeting		€/meeting	€/meeting	€/meeting

Price list for Case implementations for Specific Contracts:

For the Case implementations for Specific Contracts, the financial blocks defined here above, have to be added, multiplied, or combined, in order to implement the activities requested to obtain the deliverables and achieve the objectives. See Section H for the price setting for the Case implementations for Specific Contracts.

5. Checklist for the main call and for the offers for Cases for Specific Contracts

The checklist must be used to ensure that you have provided all the documentation for this tender and in the correct way. This checklist should be signed and included in envelope **A** of your offer.

You must submit your offer in one envelope which contains 3 separate inner envelopes clearly marked envelope **A**, **B** and **C** (for the Framework Contract).

Envelope C is one only envelope and is valid for the main call for tender for Framework Contract and for the offers for Case implementation for Specific Contracts.

The **innermost envelopes** for the Cases for Specific Contracts, to be added to those for the main call for tender for Framework contract, are:

Envelope A1, containing one original (unbound, signed and clearly marked as "Original") of the **Technical Proposal for the offer for the Specific Contract 1** and four copies (bound and each marked as "Copy").

Envelope B1, containing one signed original and four copies of the **Financial Proposal for the offer for the Specific Contract 1**.

Envelope An, containing one original (unbound, signed and clearly marked as "Original") of the **Technical Proposal for the offer for the Specific Contract n** and four copies (bound and each marked as "Copy").

Envelope Bn, containing one signed original and four copies of the **Financial Proposal for the offer for the Specific Contract n**.

5.1 Checklist

Please Tick ✓ the boxes provided

Indicate here to which offer this Checklist applies, main call of which case for specific contracts

Envelope 'A' for the Framework Contract offer (and A1...An for the Specific Contract offers) must contain

- one original signed copy and 4 copies of the technical proposal.
- this checklist signed and dated.

Envelope 'B' for the Framework Contract offer (and B1...Bn for the Specific Contract offers) must contain

- one original signed copy and 4 copies of the financial proposal based on the format found in **section D.2.**

Envelope 'C' must contain

- the 2 eligibility documents as described in **section B.5.**
- The evidence documentation related to the selection criteria found in **section C.6.**
- administrative data following the format found in **section D.1.**

You should also ensure that:

- your offer is formulated in one of the official languages of the European Union. ECDC prefers however to receive documentation in English, although this does not constitute a selection nor award criteria and will be ignored for the purposes of considering the tender.
- Both the technical and financial proposals of the offer are signed by the tenderer or his duly authorised agent.
- your offer is perfectly legible in order to rule out any ambiguity.
- your offer is submitted in accordance with the double envelope system as detailed in **section B.10.**
- the outer envelope bears the information mentioned in **section B.10.**

Name:

Signature:

Date _____

6. Confirmation of offer submission

In order to keep track of offers due to arrive, tenderers who do not hand deliver their offers are requested to complete and return this form by fax or email.

“Evaluation of public health benefits of partner notification”

OJ/2008/04/11 - PROC/2008/006

Attn: ECDC, Attention to **Procurement**

Fax: +46 (0)8 586 01 001

Email: procurement@ecdc.europa.eu

I have submitted an offer for this tender on ___/___/200__ using the following delivery service:

- Normal mail
- Express mail
- Courier Service
- Other _____

Tenderer name:	
Email:	
Telephone N°:	

Section E – Draft Framework Contract

The draft contract is provided solely for information. Tenderers should note that in the case that their offer is successful the resulting contract will be based on this draft contract.

Section F – Guidelines and general information concerning the offers to the Cases for Specific Contracts and price setting

1. What should my offer to the Cases for Specific Contracts consist of?

Tenderers must submit offers for Specific Contracts, each of which comprises of the following 3 elements:

1.1 Technical proposal

The technical proposal must be consistent with the terms of reference for Cases for Specific Contracts. The technical proposal for each Specific Contract offer is to be sent in a separate envelope. It contains all information requested in **section G.1**. In preparing the technical proposal you should bear in mind the award criteria against which it will be evaluated, see **section C.7** (the award criteria are the same for the Framework Contract and the Specific Contracts).

- *Checklist*

The checklist found in **section D.5.1** must be included also as a cover page of your technical proposal for each offer to Case for Specific Contract.

1.2 Financial proposal

The financial proposal must include a detailed financial breakdown based on the format found in **section H.1**. The financial proposal for each Specific Contract offer is to be sent in a separate envelope. Prices must be quoted in EURO using the conversion rates published in the C series of the Official Journal of the European Communities on the day when the invitation to tender was issued. This information is also available on the Website of the European Central Bank at the following URL: <http://www.ecb.int/stats/eurofxref/>.

Prices must be quoted free of all duties, taxes and other charges (including VAT) as the ECDC is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Communities.

1.3 Supporting documentation

No further supporting documentation is needed, as it is given with the main tender.

1.4 Where do I find the standard provisions ECDC applies in its Specific Contracts?

In drawing up your offer, you should bear in mind the provisions of the draft Specific Contract (see **section I**), which makes reference to the Framework Contract (see **section E**). In particular, the draft contract indicates the method and the conditions for payments to the contractor.

Submission of a tender implies acceptance of all the terms and conditions set out in the invitation to tender, in the specification and in the draft contract and, where appropriate, waiver of the tenderer's own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.

1.3 How should I mail present my offer for Specific Contract?

These offers are to be presented concurrently with the offer to the call for tender for the main framework contract.

1.5 Double envelope system

Offers for Cases for Specific Contracts must be submitted in accordance with the **double envelope system**, as indicated in section B.10.3 and the checklist as indicated in section D.5.

1.4 How will my offer be evaluated?

Offers for Cases for Specific Contracts are opened and evaluated in the same sessions as the offers for the main framework contract, using the same evaluation criteria. The evaluation criteria for the technical and financial offers are applied to each Case for Specific Contract.

Section G – Information on Cases for Specific Contracts

1. Terms of reference Case Implementation for Specific Contracts and price setting

Evaluation of the public health benefits of partner notification

1.1 Request for offer specifications

The purpose of this Request for Offer is to give instructions and guidance to the offerer about the nature of the offer for Cases for Specific Contracts and to serve as the contractor's mandate during project implementation of specific contracts. These Terms of Reference ensure that the project will be properly conceived by the contractor, that the work is carried out on schedule and that resources will be properly used.

These Terms of Reference will become part of the specific contract(s) that may be awarded as a result of the concerned offer(s).

This case implementation is designed in order to evaluate how the price list is applied to a specific case. This case implementation is proposed as Specific Contracts. The ECDC wishes to contract immediately these, concurrently to the signature of the Framework Contract. The tenderer is asked to subdivide the implementation in three specific contracts. These offers can be considered as specific lots of implementation. The result of the combination of these offers is to reach the deliverables requested and obtain the objective(s). ECDC wishes to contract in 2008, subject to confirmation of budget availability the implementation. The amount currently budgeted for contracting the total of the three specific contracts is up to a maximum of 180,000 Euro.

The specific contract(s) offered to be signed in 2008, have to be designed in order to be self standing and generate practical deliverables that can be used, without needing further specific contracts implementation afterwards. The specific contract(s) signed in 2008 should be implemented by end of June 2009..

THE TENDERER IS REQUESTED TO PRESENT ALREADY THE OFFERS FOR ALL THE SPECIFIC CONTRACTS RELATIVE TO THE WHOLE OF THE CASE IMPLEMENTATION SUBDIVIDED IN IMPLEMENTATION LOTS FOR SPECIFIC CONTRACTS AND SPECIFIED HERE BELOW.

1.2 Background and selected references

Please refer to the background and selected references of the Tender Specifications in section C.2 for offer for the framework contract.

2. Terms of implementation of Cases for Specific Contracts and price setting

2.1 Objective

Partner notification is part of the control measures of sexually transmitted diseases in many European countries. There is a wide variation in policies and practices as to the legal provisions, the range of diseases covered, the notification process itself, the account being taken in professional guidelines, the management of confidentiality issues, partner-information, -counselling and -treatment and the monitoring, evaluation and priority setting of partner notification activities.

In the coming years ECDC will provide scientific guidance documents on key prevention strategies for HIV and other sexually transmitted infections (STI). Partner notification is considered as one of the key strategies ([cf. ECDC, Annual Work Programme 2008, page 20](#)). This request for offer, for Cases for Specific Contracts, addresses the need for an evaluation at European level of partner notification of

sexually transmitted infections (HIV; other, bacterial and viral STI; hepatitis B and C, also in the context of sharing of drug equipment) in terms of its role as a key prevention strategy, its public health benefits, its limitations and barriers for its use.

2.2 Deliverables: 3 Cases for price setting and 3 Specific Contracts

Case 1: Knowledge base on partner notification policies and practices

1. Inventory of partner notification policies and practices, legal frameworks, professional guidelines and recommendations in the Member States
2. Literature review and annotated list of selected key papers and documents

Case 2: Evaluation of the public health benefits of partner notification

1. Report describing partner notification practices including practical approaches, methods, tools and procedures
2. Report describing the coverage, yield in terms of notified partners, partners presenting for diagnosis and treatment
3. Report describing barriers to partner notification and to the referral of notified partners to health services in example populations and countries
4. Scientific publication
5. Outline of an evidence based framework to strengthen the role of partner notification as a key prevention strategy

Case 3: Validation of the outlined framework

1. Delivery of an expert meeting
2. Meeting Report including the experts recommendations and a further development of the outlined framework

THESE THREE CASES ARE FOR THE FIRST THREE SPECIFIC CONTRACTS. THE TENDERER CAN RECONSIDER THESE CASES SUBDIVISIONS AND PRESENT OTHER SUBDIVISIONS, JUSTIFYING THE CHOICES TAKEN. THE TENDERER IS REQUESTED IN THIS SITUATION, TO CLARIFY THE CHOICE AND IS FREE TO RECLASSIFY THE CASE IMPLEMENTATION GROUPINGS.

2.3 Activities

Please consider that the list of activities is intended as a guide for the tenderer. The contractor can consider conducting additional or alternative activities to meet the objectives outlined in chapter C.3.1. Proposed activities should be clearly stated in the proposal and accompanied with a financial offer related to them.

1. Perform a literature review on policies, legal frameworks, guidelines, recommendations, practices, results, outcomes and barriers of partner notification in the EU Member States.
(for Case 1).
2. Conduct surveys among EU Member States, professional associations and learned societies to collect information on **partner notification policies, legal frameworks, professional guidelines and recommendations** giving special attention to
 - the legislative background,
 - the integration of partner notification in comprehensive prevention and control strategies,
 - involved public health institutions, health care providers and other actors,
 - specific policies and guidelines for high risk and vulnerable populations (MSM, pregnant women, migrants, sex worker, young adults, women in reproductive age),

- approaches to monitoring, evaluation of results and outcomes and priority setting
 - partner notification methods (patient referral, provider referral, contract referral), procedures and supporting tools.
 - the issues of mandatory partner notification, duty to warn, confidentiality and consent.
- (for Case 2)
3. Conduct surveys among EU Member States, professional associations to collect information on **partner notification practices** giving special attention to
 - approaches to different diseases, methods, tools and procedures,
 - approaches to partner notification for high risk/vulnerable groups,
 - practices concerning confidentiality and consent,
 - counselling and referral for the index patient,
 - counselling and treatment for the notified partner,
 (for Case 2)
 4. Conduct surveys among EU Member States, professional associations and learned societies to collect information on **results and outcomes of partner notification** giving attention to
 - coverage, yield in terms of notified partners, partners presenting for diagnosis and treatment,
 - adverse effects and outcomes,
 - approaches to monitoring, data collection, use of collected data,
 - coverage of partner notification in terms of the epidemiologically relevant diseases,
 - yield of partner notification in terms of diagnosed / treated partners and reinfections, impact of partner notification on transmission of disease.
 (for Case 2)
 5. Conduct surveys among the EU Member states, professional associations and learned societies to collect information on **barriers to partner notification** giving special attention to
 - legal, administrative, financial and social barriers
 - attitudes and perceptions of health care providers, index patients and notified partners.
 (for Case 2)
 6. Build up a structured database of collected documents.
(for Case 1)
 7. Compare policies, practices and outcomes.
(for Case 2)
 8. Analyze and report on barriers to partner notification and to the referral of notified partners to health services in example populations and countries.
(for Case 2)
 9. Identify and report on enabling and supportive factors for partner notification.
(for Case 2)
 10. Write a report on the results of the surveys including on assessment of the public health benefits of partner notification.
(for Case 2)
 11. Meet with ECDC to discuss the results of the previous activities.
(for Case 2)
 12. Write scientific articles on the results of the surveys.
(for Case 2)

13. Organize, deliver meetings and write the meeting reports.
(for Case 3)
14. Coordinate activities of contractors and participants
(for Case 4)

2.4 Process:

The contractor is requested to:

- present a detailed work plan with timeline, approach and list of milestones and deliverables for the work in the offer, then review these with the Head of Scientific Advice Unit and delegated staff and at implementation inception and at the latest two weeks after the specific contract signature so that these are agreed by ECDC.
- work in close collaboration with ECDC's horizontal programme on HIV, STI and blood-borne viruses and report to the Head of Scientific Advice Unit.

2.5 Delivery of the expert-meeting

Previous activities are to be concluded by a meeting with relevant experts to validate and further develop a framework to strengthen the role of partner notification as a key prevention strategy. The meeting should be organised to take place in 2009, with duration of no longer than two days and a maximum of 15 experts (including the contractors own staff, ECDC staff additional). ECDC staff costs needed to go in mission to the meeting are covered by ECDC (travel, subsistence, accommodation).

Ensure the delivery of the full meeting, including

- Identify experts with the relevant expertise for the purpose of a multi-disciplinary meeting; provide ECDC with the list for approval. If participants were not in the original tender offer, provide their affiliation and contact details.
- Prepare the invitation including the scope and purpose of the meeting, describing the objectives, the expected outcomes and the agenda
- Develop the programme of the meeting, allowing for a multi-disciplinary approach when considering the outlined framework. In the programme provide sufficient opportunity to identify the strengths and weaknesses of the outlined framework, and to further strengthen it. Pursue an agreement on a final framework as best outcome of the meeting.
- Organize and cover travel for all experts and contractor staff..
- Provide the meeting venue as appropriate according to the agenda, number of participants and duration of meeting, ensuring smooth implementation and ideal working conditions; including all relevant material such as personal computer (including software as Windows, office package as PowerPoint/Excel/Word, Internet and email connection, DVD), overhead projector, video projector, laptop for PowerPoint and beamer, screens, flip charts, microphones and full sound system, easy access to printer, photocopier (with sorter and stapler function); and including coffee breaks and water on the table during meeting.
- Organise catering when group meals are organised.
- Organize accommodation, meals and subsistence for all participants. Cover the expenditures for accommodation and for daily subsistence (including local transportation excluded from travel; deducting meals costs when catering is provided).
- The meetings language shall be English;
- Provide printed material related to the meeting;
- Ensure the relevant administrative, technical and secretarial support to allow for the smooth organisation and implementation of the meeting;

- Ensure that all participants sign the participants list for each day of the event;
- Collect the material presented at the meeting;
- Write a report of the main discussion points of the meeting, including the experts' recommendations.

2.6 Indicative time schedule of the Case implementations

The contractor is requested to propose a detailed time schedule, specified at the level of activities, for the implementation of each offer for Specific Contract in coherence with the proposed activities implementation, to be implemented by the first half of 2009.

2.7 Budget

The maximum budget for specific contracts signed in 2008 is **Euro 180,000. Approximately 16% of the available budget are allotted to Case 1, 66% to Case 2, and 16% to Case 3.**

No maximum budget is indicated for specific contracts signed from 2009

The tenderer is requested to use for Section H.1 the pricelist provided in section D.4 for the offer for the framework contract, and use the financial blocks that are specified in Section D.4, combining and adding them in order to add up to those necessary to carry out each specific contracts proposed. Each lot proposed corresponding to a specific contract offer should be presented in a separate envelope and be self explanatory independently from each other lot for specific contract.

2.8 Payments

The contractor must take into account the following in the preparation and use of the budget:

Payments will be performed as follows:

The contractor is requested to provide, for each lot corresponding to a specific contract offer, a payment plan, with maximum two payments, of which the last is the final payment. These payments have to be related to the deliverables produced, and the amounts should correspond to the pro-quota of the total work performed. So, it may be clear that, if the proposed payments are 40% interim and 60% final, this has to correspond to deliverables equivalent to the 40% of the implementation for the interim payment and to the 60% for the final payment.

AN EXAMPLE for the total of the implementation, before it is split in specific contracts offers, is the following:

- 40% interim payment upon receipt of a correct invoice/request for payment and approval of the delivery of final version of the study protocols.
- 60% final payment upon receipt and approval of a final invoice, final financial and technical report, the related supporting documents, and all the deliverables.

2.9 Reporting requirements

The contractor will ensure that the following reports are provided to ECDC in English, within the deadlines stated below:

- Reports as specified in the “deliverables” above.

- **A final financial report should be submitted to the ECDC within one month from the completion of the assignment.** This final report should include:
 - a comprehensive technical report on the implementation explaining clearly when, where and how tasks were implemented.
 - the final financial report and all the required supporting documents (including a brief translation in English of eventual invoices/documents in local language),
 - relevant written correspondence, including ECDC's approval on any item mentioned above.

3. Content of the technical proposal for Cases for Specific Contracts

As described in **section B.1** your offer must consist of three elements. One of these elements is the technical proposal, which must clearly contain the following information.

Experience of the team mobilized by the tenderer

Tenderers should give a description of the team from the tenderer that would be working with ECDC. Tenderers should describe how team will be organised and how they will ensure successful organization of services to be rendered.

Modality of delivery of services

Tenderers should describe how they propose to deliver the items requested in Section G.1

Timeliness of service offered

Tenderers should provide a detailed schedule/calendar for carrying out activities in order to deliver the services within the timeline provided by June 2009 for the specific contract(s) offered for signature in 2008. The schedule is to be in line with the needed organisation of the tasks indicated in section G.1.

1.5 Content of the financial proposal

The financial proposal must be based on the format found in **section H.1**.

As mentioned in **section B.1**, the ECDC is exempt from all duties, taxes and other charges, including VAT. **For this reason all prices given in the financial breakdown should be free of VAT and other taxes or duties.**

1.6 Selection criteria

The Tenderer must submit evidence of his capacity to perform the contract, for the Framework Contract. Please refer to section C.6 above.

1.7 Award criteria

The award criteria used are those indicated in **Section C.7** above.

The tenderer should propose a sound methodology and a realistic work plan to ensure the deliverables are provided in a comprehensive and timely manner. The tenderer will describe the different activities to be undertaken, and specify the methodology to be used and the resources needed. A timeline for reaching the main milestones should be presented (see template).

The award criteria serve to identify the quality of the offer in terms of feasibility and value of implementation. The quality of the offer for the specific contracts will be evaluated in accordance with the award criteria and associated weighting as for the framework contract. No award criteria and sub criteria others than those detailed in Section C.7 above will be used to evaluate the offer.

Section H – Standard Forms for Specific Contracts and price setting

The standard forms are to be completed and provided as part of your offer for specific contracts.

1. Proposal - for each offer for Case for Specific Contract

1.1 CASE IMPLEMENTATION SCHEDULE

Company: _____
Date: _____
Signature: _____

Please consider that the list of activities is only intended as a general guide for the tenderer. The contractor can consider conducting additional or alternative activities to meet the objectives outlined in Section G.3.1 and deliverables of Section G.2.1. Proposed activities should be clearly stated in the proposal and accompanied with a financial offer related to them.

Where applicable please provide in the heading the detailed breakdown such as unit (e.g. person days/hours, items), no of units, times performed (e.g. no of meetings), amount per unit, total amount. All applicable inputs costing need to be detailed in the templates provided.

The tenderer is requested to build up this schedule using the pricelist provided in section D.4 for the offer for the framework contract, using the financial blocks that are specified in Section D.4, combining and adding them in order to add up to those necessary to carry out each specific contracts proposed. Each lot proposed corresponding to a specific contract offer should be presented in a separate envelope and be self explanatory independently from each other lot for specific contract.

All components in this schedule need to be a combination, addition, multiplication of financial blocks specified in Section D.4 for the offer to the Call for the Framework Contract. This applies also for any further Specific Contract Offer within the duration of the Framework Contract. The financial blocks of Section D.4 for the offer to the main Call have therefore to be planned all already to be usable for different offer for Specific Contracts. Financial expenditures of Offers for Specific Contracts that are absent in Section D.4 of the main offer are out of the scope of the would be signed Framework Contract, and therefore unusable.

Please report each activity and quantify the resources needed in terms of expertise and in terms of other resources, quantifying them (days needed for experts).

Activity block (template)

Activity Description: Detailed quantifiable description of the activity (e.g. indicating the number of countries surveyed etc.). Indicate the expertise typed applied and the outcome of the activity related to the deliverables of Section C.3.2.	Senior Expert	Expert	Junior Expert	Other personal	TOTAL Activity HR
	N. Person Days	N. Person Days	N. Person Days	Quantity	Activity lump-sum
	...	...	...	e.g. secretary, documentalist	

Other resources/materials/expenditures (template)

ACTIVITY DESCRIPTION (clearly quantifiable specification of the activity)	
RESOURCE/MATERIAL/EXPENDITURE	Quantity
.. Description .. (e.g. administrative expenditure, consumables, software)	
... description ...	
... description ...	
...	
...	
...	
...	
...	
...	
...	
...	
...	
...	
...	
TOTAL lump-sum Activity other resources/mat/exp	amount €

Meetings

Number of persons	Meeting/Location	Origin
	<i>own premises</i>	< 150 km
	<i>own premises</i>	150 - 800 km
	<i>own premises</i>	> 800 km
	<i>central</i>	< 150 km
	<i>central</i>	150 - 800 km
	<i>central</i>	> 800 km
	<i>peripheral</i>	< 150 km
	<i>peripheral</i>	150 - 800 km
	<i>peripheral</i>	> 800 km

Number of persons	Meeting/Location	No. of Days
	<i>own premises</i>	1
	<i>own premises</i>	2
	<i>own premises</i>	3
	<i>central</i>	1
	<i>central</i>	2
	<i>central</i>	3
	<i>peripheral</i>	1
	<i>peripheral</i>	2
	<i>peripheral</i>	3

Schedule for providing the meeting venue as appropriate according to the agenda, number of participants and duration of meeting, ensuring smooth implementation and ideal working conditions; including all relevant material (template).

Meeting: own premises, central/peripheral location	Location
Indicate which one of the three	e.g. central
number of participants	15
Resource/Material/Expenditure	Quantity
meeting venue	1
personal computer (including software as Windows, office package as power point/Excel/Word, Internet and email connection, DVD)	
overhead projector	
video projector	
laptop for power point	
beamer	
screens	
flip charts (with paper and pens)	
microphones and full sounds system (depending on interpretation needs and/or meeting size)	
easy access to printer, photocopier (with sorter and stapler function)	
Other resource/material	
Other resource/material	
Other resource/material	
coffee breaks and water on the table during meeting;	
catering during the meeting	
printed material related to the meeting, collected before and during the meeting	
relevant administrative, technical and secretarial support	
Report on discussion points	
Total resources/mat/exp meeting	€meeting

Section I – Draft Specific Contract

The draft specific contract is provided solely for information. Tenderers should note that in the case that their offer is successful the specific contracts passed will be based on this draft specific contract.