

Call for Tender

Horizon Scanning Exercise for the European Patients' Forum Strategy 2021-2027

January 2020



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1. About EPF

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

EPF is an independent, non-profit, on-governmental organisation based in Brussels. EPF currently represents 74 member organisations across the European Union, which are either national coalitions of patient organisations or disease-specific patient organisations active at European level. EPF reflects the collective voice of an estimated 150 million patients living with various chronic diseases in Europe.

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

2. Background information

This call for tender refers to the preparatory work for the development of EPF's new Strategic Plan for the period beginning in 2021. EPF's current Strategic Plan runs from 2014 until 2020.

As part of the development process, we wish to integrate a comprehensive analysis of the environment in which EPF operates as an organisation, including political and societal developments, changes in the European health policy environment, scientific developments, emerging challenges and opportunities.

As a reference, EPF's Strategic plan 2014-2020 is available on our website at <https://www.eu-patient.eu/globalassets/library/strategic-planning/epf-strategic-plan-2014-2020-final.pdf>

3. Purpose of the tender

The purpose of this tender is to select a professional Consultant **to undertake a focussed horizon scanning exercise** as a means to develop **a structured report** which will inform and contribute to the development of the EPF Strategy Plan 2021-2027.

The Consultant will undertake an analysis of the **external environment** that shapes and affects the current and future activities of the European Patients Forum, including: updating the previous **PEST analysis** political, economic, social and technical factors, contributing to opportunities and threats element a **SWOT analysis** (EPF's strengths and weaknesses and identify the threats and the opportunities) that this changing environment entails for EPF. There is also the need to undertake a limited **sector analysis** and finally to give consideration as to how the **forms of patient engagement** are likely to evolve over the next decade, including reference to the digital and on-line environment.

The exercise will result in the development of a short report, which would be presented to the Senior Management Team of EPF so as to allow for a seminar/discussion and which will both inform and form part of the new EPF Strategic Plan

4. Description of services

4.1. SPECIFIC TASKS

The following tasks are requested:

PEST Analysis

A PEST Analysis was undertaken in the development of the current Strategic Plan and it is proposed that the contractor looks to update and augment this content, rather than develop an entirely new one. It is suggested that areas of augmentation are likely to include the following:

- Digital health
- Personalisation
- On-line patient communities
- Prevention and health literacy

This should not be considered an exhaustive list, with the contractor encouraged to expand and develop on this and the pre-existing PEST analysis.

SWOT Analysis

The EPF Secretariat will include a SWOT Analysis as an annex to its Strategic Plan, incorporating relevant elements within the Plan itself. The internal strengths and weaknesses assessment is being undertaken internally and the contractor is only required to inform the external opportunities and threats. It is proposed that this is developed by the contractor based upon the use of relevant primary and secondary sources, augmented if required by a focussed and limited stakeholder engagement process.

Sector Analysis

The Consultant will assess other state, NGO and private sector organisations who undertake activities similar to those undertaken by EPF at a national and well as a European level and make an assessment as to the potential shape and dynamics of the crosscutting patient advocacy and engagement landscape. This should primarily focus on cross cutting organisations e.g. Active Citizens Network, IAPO but where relevant it can include reference to condition specific organisations such as EURORDIS.

This analysis is less a competitor analysis and more one that will help EPF to understand where the strategic direction of other organisations within the sector may have a material impact on the current or future activities of EPF.

Trends and Developments in Patient Engagement

EPF is increasingly aware that the breadth of activities which patients are being drawn into is rapidly growing and evolving. Our new Strategic Plan will set out this landscape and will propose a structured strategic response. To help facilitate this the contractor is asked to review secondary evidence and where necessary undertake primary research to provide an indication of how each of the following areas are presently and how they may develop over the next decade:

- Patient advocates – increasing the capacity and capability of patients to advocate for equitable access to patient driven health care
- patient educators – principally involved in contributing to curriculum and course delivery of medical education
- patient improvers – supporting care pathway and other service improvement processes within health delivery systems
- patient academics – researchers drawing upon and focussing on their own lived experience when undertaking academic research and/or teaching
- patient innovators – patients drawing upon their lived experience to develop technological and other related solutions to address patient needs

The contractor is also asked to assess whether there are likely to be forms of patient engagement additional to those set out above and if so, to make additional comment as to what these maybe and how they may develop over the next decade.

The report produced should enable the European Patients' Forum secretariat, Board and Members to understand the challenges and opportunities facing our organisation, and the patient community as a whole, and to formulate a new Strategic Plan that is fit for our future environment, including a possible review of our Strategic Goals and priority actions.

4.2. SPECIFIC ACTIVITIES

This piece of work will need to be limited and focussed so as to be completed within a four week period and as such the methodology employed should be reflective of this. In responding to the tender it is proposed that the following methods be considered, with others such as data analysis only suggested if relevant and deliverable within the given timeframe.

Activity 1 – Desk research. Research to identify important trends and developments. This should result in an initial draft analysis which can raise additional questions that need to be further explored with stakeholders.

Activity 2 – Interviews. The contractor may propose to undertake interviews with a sample of relevant external/internal stakeholders, including EU and national policymakers, international organisations, pharmaceutical, med-tech and other relevant industry, public health NGOs, and a selection of EPF's members.

4.3. SPECIFIC ACTIVITIES

There are two required study outputs, both of which will need to be delivered within the agreed timeframe:

Study Report – This should work within the 1:3:25 reporting framework (c.f. https://www.betterevaluation.org/resources/guide/reader-friendly_writing) unless otherwise agreed between EPF and the Contractor

4.4. TIMEFRAME

Task	Description of deliverable	Due date
Task 1	Draft Report	March 1 st 2020
Task 2	Presentation and Seminar with EPF Senior Management Team	w/b

5. Participation in the tendering procedure

6.1. BUDGET AND DURATION

The indicative contract value is €10,000 including fees, administrative overheads and VAT.

The duration of the assignment is four weeks, with contractors asked to set out detail regarding staffing and other inputs in their tender submission.

6.2. TENDER SUBMISSION

Tenderers should submit the following documents:

- Tender submission form
- CVs of the people involved in implementing the tasks
- A list of references and examples of previous work

The offer should be submitted to Usman Khan, EPF Executive Director (usman.khan@eu-patient.eu), by 2

6.3. TENDER PROCESS

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

6.4. TENDER EVALUATION

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

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

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

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

Qualitative award criteria	Points
Qualitative criteria 1: A cost proposal - Most economically advantageous tender for an indicative budget of 10,000€, VAT included.	20
Qualitative criteria 2: Expertise in conducting situational analysis including SWOT and PEST analysis. If possible, please provide a list of references and examples of work.	25
Qualitative criteria 3: Demonstrated knowledge of the European health policy environment. Knowledge of related areas, including patient engagement.	25
Qualitative criteria 4: Congruence of proposal with the timeline – Measures in place to ensure timely delivery of the services concerned.	15
Quality criteria 5: Knowledge of English language (mother-tongue level)	15

6.4. EXCLUSION CRITERIA

Candidates or tenderers shall be excluded from participation in this procurement procedure if:

- a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) they have been convicted of an offence concerning their professional conduct by a judgment which has the force of res judicata;
- c) they have been guilty of grave professional misconduct proven by any means which the EPF can justify;
- d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the EPF or those of the country where the contract is to be performed;

- e) they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Union’s financial interests;
- f) following another procurement procedure or grant award procedure financed by the Union’s budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.

6.5. SCHEDULE

The tender is open from 23rd January to 30th January 2020.

Tender submission and schedule of the work are as follows:

Launch Tender	EPF	23 rd January
Close of the Tender	Tenderer	30 th January
Selection of the tenderer	EPF	31 st January
Signature of the Contract / Briefing session with EPF Membership & Stakeholder Relations Manager to agree on the objectives, the methodology, and the process;	EPF - Tenderer	3 rd February
Start of the assignment	Tenderer	4 th February
End of the assignment	Tenderer	2 nd March

6. Terms of payment

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

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

7. Quality issues

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

8. Confidentiality and conflict of interest

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

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

9. Terms and conditions

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

By submitting a proposal, the tenderer agrees that:

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

The accomplishment of a tendering procedure imposes no obligation on the EPF to award the contract. Should the invitation to tender cover several items or lots, EPF reserves the right to award a contract for only some of them. EPF shall not be liable for any compensation with respect to tenderers whose tenders have not been accepted. Nor shall it be so liable if it decides not to award the contract.

10. Contact person

For more information, please contact:

Usman Khan

Executive Director

usman.khan@eu-patient.eu

Tel: +32 (0)2 280 23 34.

11. Contracting authority

European Patients' Forum (EPF)

Chaussee d'Etterbeek 180

1040 Brussels

Belgium

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