



**FRA**

EUROPEAN UNION AGENCY FOR FUNDAMENTAL RIGHTS



## **ANNEX A.1 – TECHNICAL SPECIFICATIONS**

### **OPEN CALL FOR TENDERS**

**F-SE-13-T06**

**Provision of services for participatory action research  
on local Roma integration plans**

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## 1. Technical specifications

### 1.1 Objective

The objective of these Technical Specifications is to provide the contractor(s) with all the necessary information that will allow them to implement the project.

### 1.2 Title of the Framework Contract

The title of the Framework Contract is: **“Provision of services for participatory action research on local Roma integration plans”**.

### 1.3 Contracting Authority

The contracting authority is the European Union Agency for Fundamental Rights (hereinafter referred to as the FRA or the Agency). The Agency was established by Council Regulation No 168/2007<sup>1</sup> on 15 February 2007. Its objective is to provide the relevant institutions, bodies, offices and agencies of the Community and its Member States when implementing Community law with assistance and expertise relating to fundamental rights.

## 2. Background information

### 2.1 FRA mandate

To meet the objectives listed in Council Regulation No 168/2007, the Agency is empowered to collect, analyse and disseminate relevant, objective, reliable and comparable information and data, and to carry out scientific research and surveys.

In order to fulfil its objectives the FRA conducts research collecting relevant primary and secondary data and contextual information from EU Member States, and analyses them comparatively in order to develop policy relevant reports addressed primarily to its main stakeholders – EU institutions and Member States. The Agency collects available secondary source data and material on the situation of fundamental rights in the EU, and utilises its own contracted research networks for this. Where there is a lack of comprehensive and comparable EU-wide data from secondary sources, the Agency can undertake its own primary data collection based on fieldwork – both quantitative and qualitative. The Agency’s staff works closely with contractors in all stages of the project.

### 2.2 Policy background

Following on calls from the European Parliament and the European Council, as well as in reaction to relevant activities of Member States, the European Commission – following up to its April 2010

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<sup>1</sup> Council Regulation (EC) No 168/2007 of 15 February 2007 establishing a European Union Agency for Fundamental Rights.

Communication on the Roma – set up a Roma Task Force with the participation of several Commission DGs and the FRA to address issues of Roma integration and the use of EU funds.

On 21 December 2010, the Roma Task Force<sup>2</sup> announced its first findings noting problems of implementation of Roma strategies and specific measures at the local level, the paucity of data and highlighting that Member States do not yet properly use EU funds for the effective social and economic integration of Roma.

On 5 April 2011, the European Commission Communication<sup>3</sup> on an EU Framework for National Roma Integration Strategies up to 2020 tasked the FRA with carrying out additional research activities and with working with Member States to develop monitoring methods that can provide a comparative analysis of the situation of Roma across Europe.

In response to the Communication the FRA developed a multi-annual Roma Programme (the Programme) with the aim to contribute in assisting efforts to implement and monitor the EU Framework for Roma integration. The Programme will provide data and analysis through the implementation of surveys, through the collection of secondary data and through the collection of primary qualitative data derived from participatory action research in order to document and gain better insight into the socio-economic and human rights situation of Roma. The work will contribute to efforts to improve these, in particular with respect to the priority areas of employment, education, housing, health and any other area as per the request of the contracting authority. The Programme will also examine issues of discrimination, anti-gypsyism and related hate crime, as well as issues of citizenship and rights awareness. As part of this Programme, the FRA will pilot research at local level, as outlined in this Call for Tender, to contribute to a better understanding of the issues and to the improvement of the design and implementation of local action plans. More information on the FRA's Programme is available at <http://fra.europa.eu/en/project/2013/roma-multi-annual-programme>.

### **3. Scope of required services**

#### **3.1 Overall objective**

The overall objective of the services to be provided under this framework contract is to improve the Agency's knowledge and understanding of drivers and barriers that affect the development of actions implementing national Roma Integration Strategies at the local level and to identify how barriers can be overcome and how drivers can be shared as good practice.

The framework contract will be implemented through specific contracts or order forms that aim to identify and test ways of meaningful stakeholder engagement in the development of local Roma integration actions by creating and fostering partnerships with local authorities, members of local communities and civil society, in accordance to the 10 Common Basic Principles on Roma Inclusion<sup>4</sup>. The contractor will be asked to provide a range of services, as outlined below, through specific contracts or order forms.

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<sup>2</sup> See European Commission (MEMO/10/701 - 21/12/2010) 'Roma Integration: First Findings of Roma Task Force and Report on Social Inclusion', available at [http://europa.eu/rapid/press-release\\_MEMO-10-701\\_en.htm](http://europa.eu/rapid/press-release_MEMO-10-701_en.htm)

<sup>3</sup> COM(2011) 173 final Commission Communication from 5 April 2011 on an EU Framework for National Roma Integration Strategies up to 2020. Available at: [http://ec.europa.eu/justice/policies/discrimination/docs/com\\_2011\\_173\\_en.pdf](http://ec.europa.eu/justice/policies/discrimination/docs/com_2011_173_en.pdf)

<sup>4</sup> Council Conclusions on Inclusion of the Roma 2947<sup>th</sup> Employment, Social Policy, Health and Consumer Affairs Council meeting, Luxembourg, 8 June 2009, available at: [http://www.consilium.europa.eu/uedocs/cms\\_data/docs/pressdata/en/lisa/108377.pdf](http://www.consilium.europa.eu/uedocs/cms_data/docs/pressdata/en/lisa/108377.pdf)

## 3.2 Scope of required services

The services to be requested under this framework contract entail engaging with stakeholders<sup>5</sup> in different localities throughout the EU with the aim of empowering them through training and capacity building to participate in reviewing, implementing and monitoring Roma integration actions in one or, preferably, more of the following areas: employment, education, health and housing and any other area as per the request of the contracting authority

The implementation of this framework contract will require desk and fieldwork research applying participatory action research methods<sup>6</sup> in twenty-two localities situated in eleven EU Member States (two localities per Member State). More localities may be added.

The scope of the work that the contractor is expected to undertake shall encompass:

- Research, data collection and analysis;
- Stakeholder analysis, consultation, engagement and networking;
- Training/capacity building of local participants in data collection techniques;
- Monitoring and reporting activities;
- Developing reports, practical tools and communication material;
- Translations and interpretation, as required.

Four types of services may be requested by means of specific contracts or order forms during the implementation of the framework contract:

### **1. Services related to preparatory research and analysis, including:**

- Background desk research based on existing information to facilitate FRA in selecting twenty-two localities;
- Stakeholder, problem and objectives analysis<sup>7</sup> for the development of project plans;
- Development of concrete integrated project plans<sup>8</sup> for all localities selected by FRA;

### **2. Services related to the pilot testing in two selected localities in two Member States and planning of the implementation of project plans, including:**

- Testing the project plan in two of the localities selected by FRA;
- Analysing results, reviewing project plans and planning implementation in all localities;

### **3. Services related to the implementation of project plans in all localities, including:**

- Implementation of the project plans in all localities selected by FRA;

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<sup>5</sup> Stakeholders could include local authorities (elected representatives, as well as officials and other staff, such as youth coordinators, Roma policy experts, city planners, etc.); local Roma and non-Roma community members; Roma mediators; other public officials, such as social workers, teachers or local employers; Roma NGOs or other relevant civil society organisations.

<sup>6</sup> Participatory action research combines action research and participatory research methods [combination of “social investigation, educational work and action” (Holman, 1987)]. See, for example, Reason, P., and Bradbury, H. (2001a) *Handbook of Action Research: Participative Inquiry and Practice*, Sage, London. See also relevant articles in the academic journal *Action Research*, Sage, London.

<sup>7</sup> The analysis should be based on a logical framework approach (LFA), see for example the European Commission’s Project Cycle Management Guidelines, available at:

[http://ec.europa.eu/europeaid/multimedia/publications/documents/tools/europeaid\\_adm\\_pcm\\_guidelines\\_2004\\_en.pdf](http://ec.europa.eu/europeaid/multimedia/publications/documents/tools/europeaid_adm_pcm_guidelines_2004_en.pdf)

<sup>8</sup> The integrated project plan should encompass all elements necessary for the project implementation. It must be based on the LFA or equivalent, which should be completed first as a base source for the project plan.

- Development and finalisation of project deliverables.

#### **4. Ad-hoc expert and consultancy services**

The contracting authority may require the contractor to provide ad hoc expert and consultancy services on particular issues within the scope of services described above on the basis of fixed price and Quoted Times and Means specific contracts or order forms.

It is expected that the contractor provides all services under 1, 2 and 3 above subsequently from contract signature. Services related to preparatory research and analysis shall be provided after contract signature. Services related to the pilot testing in two selected localities shall be provided after the completion of the preparatory research. Services related to the implementation of project plans in all localities will take place after the pilot testing results. Ad-hoc expert and consultancy services may be requested throughout the whole framework contract duration.

The four types of services above shall be provided on the basis of different request for services:

- Fixed price requests for services, which correspond to the order of a well detailed and defined work as timeframe;
- Quoted Times and Means requests for services, which correspond to the order of person-days for defined tasks related to this framework contract. These orders may vary from a few person-days to a substantial number of person-days. The request for services under Quoted Times and means specific contracts or order forms will be executed at the contractor's premises or the field.

More details on the contract implementation can be found in article 1.4 of Annex B – Draft Framework contract.

### **3.3 Translations and interpretation – use of local languages**

The contractor will be responsible for translating all necessary material needed for implementing the framework contract, in accordance with the needs identified in the background research. This service constitutes a horizontal activity throughout contract implementation. In most cases this will be the official language(s) of the Member State concerned. Where migrant Roma are concerned, the language will be that of their country of origin. In addition, materials must be made available in Romani in cases where this is the language preferred by Roma participants in specific localities.

When translating material, every effort must be made to ensure that translations are functionally equivalent; that is, that they are accurate and readily understandable by respondents. The contractor will be provided with previous translations of FRA materials on Roma, and where applicable, the same terminology should be used. The contractor must ensure that native or near-native speakers are engaged, as necessary in the work.

## 4. Definition of activities, services and deliverables

### 4.1 Preparatory research and analysis services

#### Background research and analysis

The FRA plans to implement the project in twenty-two localities, two in each of the following Member States: **Bulgaria, Slovakia, Czech Republic, Finland, France, Greece, Hungary, Italy, Romania, Spain and the United Kingdom**. More localities may be added.

In order to facilitate the selection of localities the contractor would be asked to carry out desk research and feasibility analysis in order to assess and score localities listed in Annex 1 (these were covered by the FRA/UNDP-WB survey) and five localities in the UK and Finland on the basis of the criteria set out below. In addition, the contractor may assess other localities that may fulfil the criteria. An effort should be made to assess a mix of localities with Roma communities that have an urban, rural and recent migration background.

The contractor may also propose additional criteria: for example, related to initiatives employing Roma mediators, coordinators or assistants, etc. The contractor may use a grid to demonstrate assessment and how localities fulfil the criteria set out below. The contractor should include any additional criteria in the grid and justify their added value to implementation of services foreseen under 1, 2 and 3 of Section 3.2.

- Existence of local Roma integration policies, action plans, projects and/or activities which are funded fully or partly through any type of EU funds, in at least one, preferably more, of the areas of employment, education, health, housing.
- Agreement of the local authorities to cooperate in this project.
- Flexibility and inclusiveness of local authorities; willingness and ability to take on board suggestions for action identified by different stakeholders.
- Capacity of Roma and members of the local community to engage in the development and implementation of local Roma integration policies, action plans, projects and/or activities.
- Membership of local authorities in relevant networks, such as URB-ACT Roma-Net project; European Network of Mayors – Mayors Making the Most of EU Funds for Roma Inclusion (MERI); Visegrad Mayors for Roma Inclusion Forum; Council of Europe Alliance of Cities and Regions for Roma Inclusion; Eurocities Roma Inclusion Task Force; Roma SOURCE etc.
- Existence of Roma mayors and/or Roma elected representatives.
- Existence and capacity of local civil society organisations dealing with relevant issues. For example: NGOs working on Roma issues; Roma civil society organisations; projects, activities or initiatives initiated by NGOs or other civil society organisations).
- Level of community cohesion or conflict, and levels of racism and intolerance.

The background research and analysis is essential for selecting the most appropriate localities and developing local project plans. The background research will be based on information

relevant to the criteria set out above that will be collected and analysed by the contractor. In order to assess if a locality is appropriate for the contract, the contractor must assess all criteria for the selection of localities. The FRA will support this activity by providing access to available data on the socio-economic conditions of Roma and non-Roma, as well as data on discrimination experiences and rights awareness for localities covered by the FRA/UNDP-WB Roma survey. The background research will result in an analysis following a logical framework approach (LFA) or equivalent and must include risk assessment and risk mitigation. The analysis will score localities based on the criteria set out above as to their suitability for the implementation of project plans, including aspects of risk assessment and risk mitigation. The FRA will decide the specific localities in which the services under this contract will be implemented. Should the results of the analysis reveal information – unforeseeable at the time of framework contract signature –, which shows clearly that it is not feasible to carry out the work in a particular locality, FRA may decide to replace it with another locality following an evaluation of the results of the analysis.

### **Deliverable 1: Feasibility analysis report**

In the feasibility analysis report, the contractor will assess how localities meet the criteria set out in the technical specifications under 4.1, forecasting, the capacity and willingness of local governance structures and stakeholders to take on board actionable solutions. The report should also contain a brief historical background on the situation of Roma, key characteristics of Roma community and relations with non-Roma population in a given locality, including inclusion policies and initiatives and an overview of potential stakeholders to be considered for inclusion under services 2 and 3 of this call.

The Feasibility analysis report will be based on information collected and analysed by the contractor. Issues related to community cohesion or conflict and phenomena of discrimination and intolerance should also be taken into account and analysed. The report will include the following sections: (1) Introduction (2) Evaluation of criteria under 4.1 of Technical Specifications (3) Potential stakeholders (4) Capacity and political will of local governance structures (5) Anticipated thematic focus (education, employment, housing, health etc.) for action research (6) Anticipated funding needs for action implementation (7) Anticipated need for setting monitoring structures for implementation and a suggestion how to do it.

**Size: 7-10 pages per locality, excluding any annexes**

### **Stakeholder analysis and development of project plans**

The contractor will conduct in the localities selected by FRA a detailed stakeholder assessment in order to identify relevant stakeholders who could participate in the implementation of project plans, as well as other actors, such as national organisations of local and/or regional authorities, relevant national civil society organisations, etc. who could support the implementation of the project. The methods to be applied by the contractor for the stakeholder analysis, as well as any engagement techniques to be used must be approved by FRA in advance and should include aspects of risk assessment and risk mitigation.

On the basis of the background research and the stakeholder analysis the contractor will develop a project plan for each locality including aspects of risk assessment and risk mitigation and quality control for the participatory action research that would be used in the implementation of the project plans.

The project plans should set out in detail how stakeholders will be engaged after training/capacity building in the planning, reviewing and implementation of local Roma integration actions (on-going or planned) in one or more of the following areas: employment, education, health, housing and any other area as per the request of the contracting authority. The training should enable stakeholders to collect and analyse information about the situation in their locality in relation to employment, education, health, housing and any other area as per the request of the contracting authority, taking into account issues of community cohesion or conflict and phenomena of racism, discrimination and intolerance, identifying barriers, as well as opportunities and actionable solutions. In this regard, the contractor should develop appropriate monitoring and reporting tools that can be implemented over time by the local stakeholders themselves, without external intervention.

### **Deliverable 2: Stakeholder engagement analysis reports**

The contractor will expand on the overview of stakeholders provided in the feasibility analysis reports analysing the **key, primary and secondary stakeholders per locality** providing more detailed information on stakeholders' attitudes towards local Roma community engagement and potential concrete changes in Roma inclusion policies and action plans resulting from such engagement. The contractor will identify the stakeholders' functions, roles and responsibilities in regard to Roma inclusion at local level and analyse their potential involvement in services 2 and 3 under Section 3.2. The stakeholder engagement analysis will include an assessment of how different stakeholders (including donors, if relevant) could be involved at the appropriate stage in the implementation of the project plans, and include risk assessment and mitigation strategies and actions. The stakeholder analysis should take particularly into account the presence of Roma mayors, councillors, mediators, use of EU funds, availability of other funds etc. and propose how they can be appropriately integrated in the implementation under service 2 and 3.

The Stakeholder engagement analysis reports report will be based on information collected and analysed by the contractor. Issues related to community cohesion of conflicting interests of stakeholders should also be taken into account and analysed. The report will include the following sections: (1) Overview of stakeholders (2) Functions, roles and responsibilities in regard to Roma inclusion at local level (3) Assessment and identification of stakeholders to participate under service 2 and 3 (4) Opportunities arising from roles of stakeholders in addressing gaps in either existing Roma integration plans or in addressing situation of Roma in housing, employment, education and health (5) Opportunities for including stakeholders under Service 3 and more specifically under setting and conducting monitoring of implementation. (6) Conclusion.

**Size: 7-10 pages per locality, excluding any annexes**

### **Deliverable 3: Local project plans**

The contractor will build on the previous deliverables (feasibility analysis reports and stakeholder engagement analysis reports) to provide for each locality a detailed, tailor made, local project plan for all activities under service 2 and 3 under Section 3. 2 and related deliverables, including a detailed timeline for implementation. The local project plans should explain in detail how the participatory action research will be conducted, including who will participate and what would be their roles and responsibilities. Detailed information on applied methodology and on how training and capacity building of participants will be conducted should also be included. The local project plans should also outline in detail how Roma inclusion activities will be monitored, as part of the

participatory action research. Finally, the plan should also include proposals for sustaining local engagement and, in particular, monitoring activities after the end of this project.

**Size: 15-20 pages per locality, excluding any annexes**

## 4.2 Pilot activities and review of project plans

The local project plans (Deliverable 3 above) would be tested in two suitable localities selected by the FRA and revised, as necessary. The contractor would be requested to pilot the project plan, which should include training/capacity building of participants and key elements of participatory action research monitoring and reporting tools. The analysis of the outcome of the pilot activity, including the identification of shortcomings, barriers, opportunities, etc. should guide the review of all local project plans. The progress of this activity will be closely monitored by the FRA and documented by the contractor through regular progress reports.

### **Deliverable 1: Pilot testing reports and revised local project plans**

The contractor will describe in these reports the results of the pilot testing including all elements of the participatory action research focusing on outcomes, lessons learned any shortcomings or problems. Based on these reports the contractor will submit revised local project plans to the FRA for approval. The testing reports should explain in detail how the participatory action research has worked, including capacity building/training activities, supporting the revision, as necessary, of the project plans, including the roles, responsibilities and activities of stakeholders. The reports should also include a first assessment of the impact of stakeholder engagement in the design, implementation and monitoring of local Roma inclusion actions resulting from the participatory action research.

**Size: 30-50 pages per locality, excluding any annexes**

### **Deliverable 2: Information factsheet for the project**

The contractor will provide a factsheet describing the project in English and national language/s of each Member State involved, and in Romani with relevant photos, illustration, etc.

**Size: 1-3 pages for each factsheet**

### **Deliverable 3: Audio-visual material**

The contractor shall provide the following audio-visual material:

1. Video-clip of 3-4 minutes duration **for each locality**, where the testing activities took place, demonstrating the work carried out.
2. All raw footage recorded during the project shall be provided in HD resolution (in original format such as DV, XDCAM or MPEG-2); this includes also raw footage not used in the different video clips, which may be used by the FRA at a later stage.

For each video clip the contractor must submit in advance a **model script** for approval by FRA.

For all audio-visual material the contractor shall be responsible for obtaining any necessary permission or consent in full compliance with national and EU data protection legislation.

### 4.3 Implementation of the project plans in all selected localities

The provision of these services is expected to take considerable time and effort. The contractor would be asked to implement the local project plans, approved by the FRA, in all selected localities. The contractor should coordinate and implement the appropriate training and capacity building processes, including the use of monitoring/reporting tools, that will allow participants to engage actively in examining, reviewing and, if necessary, revising and then participating, as appropriate, in the planning and implementation of Roma integration actions in one or more of the following areas: employment, education, health, housing and any other area as per the request of the contracting authority.

The examination and review of local Roma integration actions should be carried out with the active involvement of stakeholders participating in the project and aim at improving their design or implementation by identifying barriers and also opportunities and solutions. It should be based on a thorough examination and assessment of the current situation in the locality taking into account issues of community cohesion or conflict and phenomena of discrimination and intolerance. It is important for the success of the project that sensitive issues, such as petty crime, begging, ethnic profiling by public and police authorities, child exploitation, trafficking, anti-gypsyism, racism, sexism and anti-social behaviours are addressed, as appropriate.

At the appropriate time, the contractor would coordinate a first round of monitoring and reporting on the implementation of Roma integration actions engaging the stakeholders participating in the project. This first round of monitoring will serve as an evaluation of the outcome of the training and capacity building of stakeholders who should gradually be in a position to apply monitoring and reporting methods, techniques and tools without external intervention.

The progress of this activity will be closely monitored by the FRA and documented through short (fortnightly) progress reports and extended (monthly) progress reports.

The audio-visual documentation of this activity is important: the contractor would be asked to produce a video-clip of 3-4 minutes duration for each locality, where the activities took place, demonstrating the work carried out and based on a model script submitted in advance by the contractor for approval by FRA. All audio-visual footage recorded during the project shall be provided in HD resolution (in original format such as DV, XDCAM or MPEG-2);

In addition, as part of this activity the contractor would monitor national and local media for any specific references to the project and report them to the FRA.

#### **Deliverable 1: Case studies**

The contractor will report on the outcome of the project in each locality through a case study, which will detail the progress of the project, challenges faced and how they were overcome with particular emphasis on the impact of local engagement in Roma inclusion processes. The case studies will provide information on how Roma inclusion actions were implemented. The contractor will also outline how funding supported the implementation of these actions and propose improvements in regard to the use of local, national, EU and other forms of funding resources. The contractor will outline how the implementation of these actions was monitored and propose how local monitoring methods, results and indicators could support the national and EU level monitoring of the implementation of National Roma Integration Strategies.

**Size: 20-30 pages per locality, excluding any annexes**

### **Deliverable 2: Comparative report on Roma inclusion efforts at local level**

The contractor will deliver a thematically structured comparative report based on findings from the participatory action research, highlighting differences and similarities between different localities and Member States with a particular emphasis on the transferability to other localities and EU Member States. The aim of this report is to identify what works and what is a barrier to Roma inclusion efforts at local level.

The report must analyse in particular improvements achieved in Roma integration focusing on housing, health, education and employment. The analysis must specify the contribution made by local, regional, national and EU governance structures and explain if and how the implementation of local Roma inclusion actions through the active participation of stakeholders can improve the implementation of national Roma integration strategies. The report should also include proposals for change that are supported by the findings of the research, particularly in regard to stakeholder engagement and participation in designing, implementing and monitoring Roma inclusion actions outlining how such engagement processes can be sustained after the end of this project within the existing governance structures, in each locality.

**Size: 100-130 pages, excluding any annexes**

### **Deliverable 3: Technical report**

The contractor will submit a detailed technical report after project completion. The report should explain how the work was carried out in each locality and include an analysis of challenges faced and ways through which these were addressed in the course of implementing the work. The report should include information on the work carried out in each locality and EU Member States describing fieldwork with respect to (1) assumptions/plans at the start of fieldwork, (2) outcomes, (3) challenges and (4) solutions implemented.

In addition to the above broad themes, the technical report should cover all aspects of the project; including, for example, the change that was possible to achieve in Roma inclusion, locally, over the course of the project and possible follow up activities.

The report should present information, wherever possible using visual aids, such as tables, graphs, etc.

The report must also make recommendations, on the basis of its findings, about the most appropriate methods to use for similar future research. The technical report should highlight any difficulties that arose in the course of implementing the work.

**Size: 150 pages, excluding any annexes**

### **Deliverable 4: Toolkit for community engagement and monitoring**

The contractor will develop a toolkit for Roma community engagement and monitoring of local Roma integration actions based on the experience and knowledge gained through this project. The toolkit should include simple step by step guidance on all essential elements of the project (community engagement, training/ capacity building, data collection, monitoring, reporting etc.) with graphic elements that enhance readability and understanding. The toolkit should be user friendly allowing local authorities, communities, civil society organisations and other relevant stakeholders to apply it on the ground with particular focus on transferability to other national or local contexts

**Size: 40-50 pages, excluding any annexes**

## **Deliverable 5: Audio-visual material**

The contractor shall provide the following audio-visual material:

1. For all localities one video-clip of 3-4 minutes duration that documents the **progress of the entire project** its main achievements and outcomes.
2. **For each locality** one video-clip of 3-4 minutes duration that documents the **progress of the entire project** its main achievements and outcomes.
3. All raw footage recorded during the project shall be provided in HD resolution (in original format such as DV, XDCAM or MPEG-2); this includes also raw footage not used in the different video clips, which may be used by the FRA at a later stage.

For each video clip the contractor must submit in advance a **model script** for approval by FRA.

For all audio-visual material the contractor shall be responsible for obtaining any necessary permission or consent in full compliance with national and EU data protection legislation.

### **4.4 Ad hoc expert and consultancy services**

During the implementation of the Framework Contract the contractor could be asked to provide ad hoc expert and consultancy services based on detailed technical specifications to be provided in specific contracts in regard to:

- Drafting ad hoc thematic reports (Quoted time & means request)
- Drafting case studies (fixed price request)
- Drafting technical reports (fixed price request)
- Drafting toolkits and/or factsheets (fixed price request)
- Producing audio-visual material (fixed price request)
- Developing and implementing training, capacity-building, forward looking, consensus and trust building processes (Quoted time & means request)
- Other expert or Consultancy services (Quoted time & means request)

## **5. Project management, reporting and monitoring**

The overall responsibility for executing the Contract, including the implementation of all measures necessary to provide the FRA on time with deliverables of the highest quality lies with the contractor.

### **5.1 Management structure**

The project team is described in Section 6 (Project Team).

The **Project Manager** responsible for the overall project coordination and implementation will act as main contact point to the Agency about all aspects relating to the execution of the Framework Contract.

The **Senior Expert** is responsible for the overall scientific quality of the work.

The **Country Coordinators** (at national or local level) will be responsible for the implementation of activities in the respective Member State or locality.

The **Language Editor** will be responsible for language quality of all Deliverables.

The **Fieldwork experts** are responsible to national or local level to conduct field research.

The contractor may propose the following combinations of coordinator and field work experts per country:

- One Coordinator and two field work experts (one per locality)
- One Coordinator and one field work expert for two localities
- One Coordinator performing the role of a field work expert in one locality and one field work expert in another locality

The FRA retains the right to communicate directly with any national or local level Project Coordinators, Senior Expert and Fieldwork Experts at any time, as necessary for monitoring the execution of the Framework Contract.

## 5.2 Communication

Communication between the contractor and the Agency shall be possible by phone during the Agency's working days and hours and through electronic and surface mail. Any written communication sent by the Agency shall be answered within five (5) working days. The contractor will monitor the implementation of Specific Contracts through progress reports to the FRA.

## 5.3 Meetings

Upon the signature of a specific contract for the provision of services described under 4.1, 4.2 and 4.3 above, an inception meeting may take place with the contractor in Vienna at the Agency's headquarters to discuss various aspects of the project's work. The aim of the inception meeting is to clarify outstanding issues as may be necessary for carrying out the Contract and for the good implementation of the project. In addition, during the course of the specific contract implementation period, another meeting can take place.

The costs of the meetings mentioned above on the contractor's side must be covered by the contractor and be included in the final price for the provision of the services described under 4.1, 4.2 and 4.3 above.

For the provision of the ad-hoc services described under 4.4 above, the contractor may be required to attend meetings at FRA premises. The costs related to participation at those meetings are not included in the price per person-day offered by the contractor for the ad-hoc services (Form F.3 of Annex C – Standard Submission Form) and must be quoted separately in the financial offer as indicated in Form F.4 of Annex C – Standard Submission Form.

Where possible, the communication between the contractor and the FRA can also be through video and or teleconferencing.

## 5.4 Project implementation monitoring

The Agency will monitor the execution of Specific Contracts in technical and administrative terms. The contractor should report immediately to the FRA in writing any problems encountered during the Framework Contract implementation.

The Project Manager will provide the FRA with concise progress reports (in MS-Office compatible format) documenting progress in the execution of each Specific Contract at regular intervals. Monthly progress reports will begin one week after the starting date of the Specific Contract and finish upon submission of the final deliverables. These would include a record of decisions made for the period covered by the report. In addition, the Project Manager for the duration of the Specific Contract must deliver to the FRA fortnightly progress reports as brief e-mails on relevant aspects of the work. This may be supported by additional e-mail and telephone contact, as considered necessary by the FRA.

In addition, during the implementation of Specific Contracts the FRA intends to send its staff to oversee aspects of the work. This can involve observation of any activity of the project as well as meetings of the Project team. The FRA reserves the right to attend at any stage of the execution of a Specific Contract without prior notice being given to the contractor. The FRA will cover all costs related to travel and accommodation of its staff in connection to such visits.

## 6. Project team

The project team for the implementation of the Framework Contract should consist as a minimum of one Project Manager responsible for management and administration, one Senior Expert responsible for the scientific quality of all deliverables, one language editor and one country Coordinator<sup>9</sup> and at least one field work expert for each EU Member State where the work is carried out. Country Coordinators can perform the role of field work experts in one locality.

The contractor is expected to organise their own project management and coordination team – the Project Team – lead by the Project Manager, to oversee all aspects of work relating to the framework contract. The Project Manager will be responsible for reporting to the FRA about developments, challenges and proposed courses of action concerning the activities and deliverables in each of the localities, including the delivery of monthly progress reports and fortnightly and monthly e-mail reporting. The team should consist of staff with the relevant qualifications and skills to manage and implement the work.

### 6.1 Project Manager

Qualifications and professional experience

- University degree
- A minimum of seven years of professional experience.
- Proven experience in cross-national/cross-cultural team management, as manager or coordinator of at least two transnational Roma projects, each project involving at least three countries.
- Very good knowledge of English (Level C1 based on Common European Framework of Reference).

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<sup>9</sup> One coordinator cannot cover more than one Member State.

## 6.2 Senior Expert

### Qualifications and professional experience

- University degree.
- A minimum of seven years of professional experience.
- A minimum of five years of experience in scientific participatory action research.
- Proven experience of at least two transnational projects related to Roma
- Excellent analytical and drafting skills proven through at least two relevant publications in peer reviewed journals or books or reports commissioned by EU/International Organisations.
- Excellent knowledge of English (Level C2 based on Common European Framework of Reference).

## 6.3 Country Coordinators

### Qualifications and professional experience

- A minimum of five years of professional experience.
- Proven experience of at least three years in community facilitation, conflict prevention and mediation skills.
- Proven experience of at least two years of conducting stakeholder consultation and engagement.
- Proven experience in at least two projects, local, regional, national or international, related to Roma inclusion
- Very good knowledge of English (Level C1 based on Common European Framework of Reference).

## 6.4 Fieldwork experts

### Qualifications and professional experience

- A minimum of three years of professional experience in conducting qualitative research and analysis.
- A minimum of two years of conducting stakeholder consultation and engagement.
- Proven experience in participating in at least two projects on Roma integration in the EU Member States.

## 6.5 Language editor

- Excellent knowledge of English (Level C2 based on Common European Framework of Reference)
- A minimum of three years of proven experience as English language editor; a minimum of two examples of edited work in English must be provided

## **7 Guidelines for deliverables**

All written deliverables must be submitted in English, copy-edited and proof-read by the Language Editor in line with the FRA Style Guide (see Annex 2). They must be written in a clear and unambiguous way, providing information and analysis that can be readily understood by a non-academic reader, such as, for example, local policy makers. The style should be balanced and neutral without unsubstantiated statements.

The written documents must be delivered in MS-Office compatible electronic files. They should contain visual elements (for example graphs, boxes or pictures) to enhance readability. The size of each written deliverable is defined in terms of A4 pages applying Times New Roman font 11pt, single spaced. The data necessary for reproducing each of the graphs in the reports must be delivered in MS-Excel compatible electronic files with one graph/table per spread sheet, and each spread sheet must be numbered using the same system as the one used in the (MS-Word) file.

Audio-visual deliverables must be in line with guidelines provided by the FRA's audio-visual team in Annex in these Terms of Reference.

The Contractor must provide the Agency with the deliverables, respecting the deadlines specified in the relevant Specific Contract. All deliverables must be revised by the contractor according to the FRA's recommendations, as necessary, and returned within the deadline mentioned in the contract. These deliverables constitute the background material for FRA publications. FRA is the sole owner of the deliverables and reserves the right to publish or not to publish them.

## 8 ANNEX 1

### Annex 1: List of municipalities from FRA interviews with Local Authorities

<b>Bulgaria</b>	<b>Czech Republic</b>	<b>France</b>	<b>Greece</b>
Berkovitsa	Brno	Avrillé	Orchomenos
Boychinovtsi	Cheb	Balma	Pineios
Byala	Hradec Králové	Bon-Encontre	Sofades
Dobrich	Jeseník	Bourges	Didimoticho
Dolna banya	Jihlava	Calais	Nestos /Chisochori)
Dupnitsa	Kladno	Cébazat	Tyrnavos
Dyulino	Kutná Hora	Grenoble	Aspropyrgos
Elenino	Libčice nad Vltavou	Haguenau	Agia Varvara
Gorna Kremena	Moravská Ostrava a Přívoz	La Chapelle des Fougeretz	Dytiki Achaia
Ivaylo	Nový Jičín	Le Havre	Megara
Kyustendil	Obrnice	Le Relecq-Kerhuon	Amaliada
Lom	Olomouc	Les Ulis	Moschato - Tavros
Marash	Orlová	Lunel	Delta
Novo selo	Ostrava - Mariánské Hory a Hulváky	Lyon	Pyrgos
Provdia	Plzeň	Marseille	Xanthi
Ruse	Praha 14	Massy	Ampelokipoi/Menemeni
Sheynovo	Praha 3	Mérignac	Drama
Slanchevo	Praha 5	Pérenchies	Korinthos
Sliven	Praha 9	Poitiers	Alexandroupoli
Sofia	Přerov	Quevilly	Lamia
Sredishte	Semily	Saint-Pierre-des-Corps	Acharnes
Stara Zagora	Slezská Ostrava	Sargé-sur-Braye	Ilion
Tsarimir	Sokolov	Strasbourg	Agrinio
Veliki Preslav	Tábor	Toulouse	Larissa
Velingrad	Ústí nad Labem - Střekov	Vitry-sur-Seine	Volos
Vidin	Vejprty	La Courneuve	
Yabalkovo	Žatec	Saint Denis	

<b>Hungary</b>	<b>Italy</b>	<b>Romania</b>	<b>Spain</b>
Alsószentmárton	Bologna	Acatari	Adra
Aszaló	Fiesole	Bahnea	Albacete
Baktakék	Firenze	Band	Alicante
Bátonyterenye	Isernia	Bucuresti	Aspe
Bercel	Mantova	Camarasu	Azuaga
Boldog	Milano	Cauas	Barcelona
Budapest VII. district	Misano Adriatico	Ciacova	Cartagena
Demecser	Modena	Cojasca	Chipiona
Esztergom	Montecchio Maggiore	Craiova	Dos Hermanas
Hejőbába	Montesilvano	Filipestii de Targ	Hospitalet de Llobregat
Hernádvécse	Napoli	Ganeasa	Huelva
Jászapáti Város	Pavia	Gura Sutii	La Roda
Kálló	Pescara	Ineu	Lanjarón
Kalocsa	Pisa	Moftinu Mic	Lleida
Letenye	Prato	Ocna Mures	Loja
Magyarcsanád	Reggio Calabria	Petelea	Madrid
Miskolc	Reggio Emilia	Pitesti	Málaga
Nagyecséd	Rimini	Resita	Mérida
Nyírbogdány	Roma	Santana de Mures	Níjar
Nyíregyháza	Sesto Fiorentino	Satu Mare	Oviedo
Ózd		Segarcea	Peñafiel
Piliny		Silivasul de Campie	Sagunto
Sály		Sotriale	Sant Adriá de Besós
Szeged		Targu Jiu	Santa Fe
Szigetvár		Timisoara	Sevilla
Szirák		Tulcea	Toledo
Tarnaórs		Turda	Vigo
Tatárszentgyörgy		Ulmeni	
Tiszabő		Viziru	
Türje			

## **Slovakia**

Chyzne  
Hrcel  
Humenne  
Kacanov  
Karna  
Kecerovce  
Kosice - Tahanovce  
Kralovsky Chlmec

## **Slovakia**

Laskovce

Mnisek nad Hnilcom

Nacina Ves

Nalepkovo

Nizna Mysla

Novy Zivot

Sabinov

Sarovce

Sena

Sobrance

Strekov

Svedlar

Terna

Tura

Turna nad Bodvou

Velka Lomnica

Vysny Medzev

## 9 Annex 2: FRA Style Guide