



Specifications attached to the Invitation to Tender

14.CAT.OP.029

Finalization of e-learning Standard
Operating Procedures (SOP)
Application Demonstrator
(eSOPAD)

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Introduction to EDA

Pursuant to Council Decision 2011/411/CFSP of 12 July 2011 defining the statute, seat and operational rules of the European Defence Agency and repealing Joint Action 2004/551/CFSP, the mission of the European Defence Agency (hereinafter “EDA” or “the Agency”) is "to support the Council and the Member States in their effort to improve the EU's defence capabilities in the field of crisis management and to sustain the CSDP as it stands now and develops in the future."

Functions and tasks

The European Defence Agency, within the overall mission set out in the Agency's constituent act, is ascribed four functions, covering:

- developing defence capabilities;
- promoting Defence Research and Technology (R&T);
- promoting armaments co-operation;
- creating a competitive European Defence Equipment Market and strengthening the European Defence, Technological and Industrial Base.

All these functions relate to improving Europe's defence performance, by promoting coherence. A more integrated approach to capability development will contribute to better-defined future requirements on which collaborations - in armaments or R&T or the operational domain - can be built. More collaboration will, in turn, provide opportunities for industrial restructuring and progress towards the continental-scale demand and market, which industry needs.

Further information can be found on the Agency's web site at <http://www.eda.europa.eu>

1 Overview of this tender

1.1 Description of the contract

The services required by EDA are described in the terms of reference in part 2 of the present tender specifications.

1.2 Timetable

Summary timetable	Date	Comments
Launch date	13/08/2014	
Deadline for request of clarifications from EDA	18/09/2014	
Site visit or clarification meeting (if any)	Not applicable	
Last date on which clarifications are issued by EDA	24/09/2014, 17:00h, Brussels local time	
Deadline for submission of tenders	01/10/2014¹	Tenders delivered by hand shall be submitted not later than 17:00h Local Time
Opening session	02/10/2014 ²	At 10:00h Brussels local time
Interviews	Not applicable	
Completion date for evaluation of tenders	October 2014	Estimate
Signature of contract(s)	November 2014	Estimate

1.3 Participation in the tender procedure

Tenderers must not be in any of the exclusion criteria indicated in section 3.1 of these tender specifications and must have the legal capacity to allow them to participate in this tender procedure (see section 3.2.1).

Please note that any attempt by a tenderer to obtain confidential information, enter into unlawful agreements with competitors or influence the evaluation committee or the EDA during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of his tender and may result in administrative penalties.

¹ The deadline for submission of tenders shall be considered to be the **date of receipt by the Agency of the tender**.

² Maximum one legal representative per participating tenderer may attend the opening session. Tenderers shall inform the Agency of their intention to attend, at least 5 days prior to the opening session.

1.4 Participation of consortia

Consortia, may submit a tender on condition that it complies with the rules of competition.

A consortium may be a permanent, legally-established grouping or a grouping which has been constituted informally for a specific tender procedure.

Such grouping (or consortia) must specify the company or person heading the project (the leader) and must also submit a copy of the document authorising this company or person to submit a tender. All members of a consortium (i.e., the leader and all other members) are jointly and severally liable to the Contracting Authority.

In addition, each member of the consortium must provide the required evidence for the exclusion and selection criteria (see **Section 3** of these tender specifications).

The participation of an ineligible person will result in the automatic exclusion of that person.

1.5 Sub-contracting

The tenderer must indicate clearly, which parts of the work will be sub-contracted.

Sub-contractors must satisfy the eligibility criteria applicable to the award of the contract. If the identity of the intended sub-contractor(s) is already known at the time of submitting the tender, all sub-contractors must provide the required evidence for the exclusion and selection criteria as detailed in **Section 3** of these tender specifications.

If the identity of the sub-contractor is not known at the time of submitting the tender, the tenderer who is awarded the contract will have to seek the EDA's prior written authorisation before entering into a sub-contract.

Where no sub-contractor is given, the work will be assumed to be carried out directly by the bidder.

1.6 Presentation of the tenders

The tenders must comply with the following conditions:

1.6.1 Tenders 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 **14.CAT.OP029**
- the project title “Finalization of e-learning Standard Operating Procedures (SOP) Application Demonstrator(eSOPAD)”
- the name of the Tenderer
 - the indication “***Tender - Not to be opened by the internal mail service***”
 - the address for submission of tenders (*as indicated in the letter of invitation to tender*)
 - the date of posting (*if applicable*) should be legible on the outer envelope.

The outer envelope must contain **three inner envelopes**, namely, **Envelope A, B and C**.

The content of each of these three envelopes must be as follows:

Envelope A – Administrative documents

- the **Tender Submission Form** found in **Annex VII**
- the duly filled in, signed and dated **Exclusion Criteria Declaration(s)** as requested in section 3.1 and using the standard template in **Annex IV**
- the duly filled in, signed and dated **Legal Entity Form(s)** as requested in section 3.2 and using the standard template in **Annex V**
- the duly filled in, signed and dated **Financial Identification Form³** using the template in **Annex VI**
- The **Economic & Financial Capacity** criteria documents as requested in section 3.2
- The **Technical & Professional Capacity** criteria documents as requested in section 3.2 - **One signed original and 3 (three) copies.**
- **Duly authorised signature**, i.e. an official document (e.g. statutes, power of attorney, notary statement, etc.) proving that the person who signs on behalf of the tenderer is duly authorised to do so.
- In case of **consortia**, the consortium agreement or a duly signed and dated consortium statement by each of the consortium members specifying the company or person heading the project and authorised to submit a tender on behalf of the consortium.

Envelope B – Technical proposal

³ in case of consortia, only **one** Financial Identification Form for the whole consortium shall be submitted, nominating the bank account into which payments are to be made under the contract in the event that the respective tender is successful

One signed original and 3 (three) copies of the technical proposal providing all information requested in point 4.2.

Envelope C – Financial proposal

One signed original of the financial proposal based on the format found in **Annex II**.

1.6.2 The original tender must be marked “**ORIGINAL**”, and the copies signed in the same way as the original and marked “**COPY**”.

1.6.3 Tenders should be drafted in one of the official languages of the European Union, **preferably** English. Requested documents not available in English should be accompanied by an English courtesy translation. The contract shall be entered into in English.

It is extremely important that tenders be presented in the correct format and include all documents necessary to enable the evaluation committee to assess them. Failure to respect these requirements will constitute a formal error and may result in the rejection of the tender.

1.7 Period during which the tenders are binding

Period of validity of the tenders, during which tenderers may not modify the terms of their tenders in any respect is 120 days after the deadline for the submission of tenders. In exceptional cases, before the period of validity expires, the EDA may ask tenderers to extend the period for a specific number of days, which may not exceed 40.

The selected tenderer must maintain its tender for a further 60 days from the date of notification that his tender has been recommended for the award of the contract. The further period of 60 days is added to the validity period irrespective of the date of notification.

1.8 Contacts between the EDA and tenderers

Contacts between the EDA and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

A. Before the final date for submission of tenders:

- At the request of the tenderer, the EDA may provide additional information solely for the purpose of clarifying the nature of the contract. Any request for additional information must be made in writing by **e-mail** at procurement@eda.europa.eu or at the **Fax No.: +32 (0)2 504 29 75** and should indicate the reference number and the title of the tender.

- Requests for additional information received after the deadline for request of clarifications from the EDA as specified in point 1.2 – *Timetable* will not be processed.
- The EDA may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tender.
- Any additional information including that referred to above will be published on the EDA's website. Please ensure that you visit regularly the site for updates.

B. After the opening 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 EDA may contact the tenderer, although such contact may not lead to any alternation of the terms of the submitted tender.

1.9 Visits to EDA premises

No site visit/information meeting at EDA's premises is deemed necessary for this procedure.

1.10 Division into lots

This tender is not divided into lots. The tenderer must be in a position to be able to provide all the services requested.

1.11 Variants

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

1.12 New services

In accordance with Article 31 of the Council decision 2007/643/CFSP of 18 September 2007 on the financial rules of the European defence Agency and on the procurement rules and rules on financial contributions from the operational budget of the European defence Agency, the EDA may have recourse to the negotiated procedure without prior publication of a contract notice for additional contracts involving services similar to those assigned to the party that was awarded this contract.

1.13 Security standards

In the general implementation of its activities and for the processing of tendering procedures in particular, the EDA observes the Council's security rules set out in

Council Decision 2013/488/EU of 23 September 2013 on the security rules for protecting EU classified information.

1.14 Contract provisions

In drawing up your tender, you should bear in mind the provisions of the draft contract (see **Annex I** to the present tender specifications). In particular, the draft contract indicates the method and the conditions for payments to the contractor.

2 Terms of Reference

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

2.1 Introduction: background of the invitation to tender

- Various European Member States are providing the command structure for EU-led military Operations in form of headquarters infrastructure (buildings, networks, etc.). These European Headquarters (HQs), be it Battle Group (BGHQ), Force (FHQ) or Operational (OHQ) Headquarters are normally inactive and not equipped with sufficient personnel when not activated. Once selected, Augmentees from pMS are offered to fill the posts in these HQs.
- Clearly defined processes for operation planning and decision-making, supporting communication and information services are a basic functionality for a proper Command and Control (C2) of military headquarters. As lessons learned from previous operations/missions/exercises clearly depicted – and also explicitly stated in the EUMC Headline Goal Task Force Interoperability Study – such processes are only partially established, and are still mainly not known and/or the personnel is not trained and experienced on the subject. The consequences of these deficiencies are a severe loss of time and increasing inefficiencies during the conduct of exercises and missions of an EU military headquarters and the need to train personnel during exercises and missions on rules, regulations, and processes.
- The task is to enable military headquarters to properly execute their missions and tasks by establishing and training those processes prior to exercises or missions in order both to save resources and to properly run missions and/or exercises.
- Therefore the aim is, to implement centrally provided in the EUMS and, if required, in pMS provided HQs a software application helping the community to train (notably through e-learning) and also to further develop/adapt these processes prior and in preparation of activation of headquarters and for new personnel during exercises/missions.
- The application will be available EU networks (EU Operational Wide Area Network/EU OPSWAN) for training and preparation.
- The demonstrator has to be based upon open source products wherever these are available.

- The final deliverables will be property of EDA and will be provided to all pMS and EU institutions for operational use.

2.2 Scope of the contract

- With this contract, the eSOPAD will be brought to an easy to use prototypal status, centrally provided via the EUMS. There is no need to install the software in one of the pMS provided HQs as it is a browser based application. Of course, for HQ specific content, the application may also be installed in respective HQs for local use.

2.3 Outline of the services required

Services	Description	Expected basic outcome	Remarks
1	Improve eSOPAD User Interface (UI) and functionality; adjust to EUMS design/branding	High acceptance by users through an intuitive usability and optically attractive appearance	MS Office/pdf
2	Process modelling concept development OHQ execution/transition Phases	Enhanced functionality	
3	Process development FHQ planning/execution/transition phase	Enhanced functionality	
4	Concept development OHQ/FHQ situation awareness/strategic assessment/develop military response options phase	Enhanced functionality	MS Office/pdf
5	Penetration testing and installation in EUMS environment.	Installation on SOLAN to be made available via EU Ops WAN	

6	delivery of user and administrator handbooks, training materiel and complete software for all HQs.	Paper	
7	2x 1-week training of the application foe admins and users EUMS and interested HQs.	Training duly delivered	

The contractor will include in the management plan proposals for needed workshops (first estimation) or interviews to condense information on requirements and processes.

2.4 Basic time lines – meetings and deliverables

The contract starts with a first coordination meeting between EDA and contractor followed by the formal kick-off. All reports (as drafts) have to be presented during Project Team CIS meetings (to be coordinated with contractor, depending on final timelines). The study ends after duration of 12 months dated from the kick-off meeting, with the handover of the final report, a final presentation and the validated demonstrator during a PT CIS meeting. The duration of 12 months may be renewed maximum 3 times, The contractor will report on study interim results during other meetings on request.

Nr	Title	Description	Timelines	Format deliverable
1	Kick-off presentation	First day: coordination between PO CIS and selected contractor to prepare kick-off with pMS (2nd day) Presentation of the study including a draft management plan	Foreseen in June 2014 (2 days)	1 hard-paper copy and 5 electronic copies (MS Office/pdf)
2	Intermediate reports	Presentation of results and outcomes including the reports of the work packages as in 2.3	On occasion of each PT CIS meeting	2 hard-paper copy and 27 electronic copies (CD/DVD)
3	Validation	The demonstrator has to be validated preferably when an HQ is activated for an exercise	At the end of each contractual year.	Life DEMO; validation report (MS office/ pdf)

4	Final presentation and final report	Presentation of the results and outcomes including the reports of the Work Packages as in 2.3	On completion of the framework contract	3 hard-paper copies of final report and 27 CD/DVD containing the final deliverable including all reports and additional documentation)
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2.5 Links with other Projects

Additional studies and their results have to be considered for the development.

2.5.1 The most important studies related to this contract are listed below, which compose the conceptual fundament of the study. EDA will furnish all documents under 2.5.1 and 2.5.2 for assessment to the selected Contractor in line with the requirements set out in 2.5.3 below.

2.5.2 References (background information only)

Studies

[1] 11-CAP-OP-136 C4I Reference Architecture OHQ/FHQ (e-learning Standard Operating Procedures Application Demonstrator – eSOPAD)

EU documents

- [2] EU Concept for Military Command and Control
- [3] EU Framework Nation Concept
- [4] EU Battle group Concept
- [5] EU Concept for CIS for EU-led Military Operations
- [6] EU HQ SOPs (Book 2)
- [7] COPD (EUMS adaptation)

2.5.3 Any document/study/results to be given to the selected Contractor for assessment will require the obligatory signature of a Non-disclosure (Confidentiality) Agreement (NDA) by the selected Contractor and EDA, to protect proprietary information (Annex IX to these Tender Specifications).

2.6 Management and Contractual Deliverables

2.6.1 General Management Aspects

The contractor shall be responsible for the overall management of the contract performance and for an appropriate coordination with the Contracting Authority including, but not limited to:

- Coordination with Contracting Authority and its representatives for the contract;
- Management of external sources of information;
- Preparation of the deliverables.

2.6.2 Methodological Aspects

The contractor should support the EDA PT CIS and therefore should closely engage with the PT CIS. Where appropriate and feasible, workshops with experts of the PT CIS should be foreseen/conducted. All needed coordination is answered by PO CIS.

Taking into account that the application shows most value when provided centrally, the contractor shall establish close contact with the EU-Ops WAN responsible people at EUMS (Contact details will be provided by EDA on request).

2.6.3 Tool-specific Aspects

As all previous developments are based upon the open source products YAWL, Liferay and PostgreSQL these are mandatory for the further development, for reasons of technical compatibility.

2.7 Specific Security Issues

The overall level of classification of the contract is **RESTREINT UE/EU RESTRICTED**. The application itself (deliverable) is Unclassified when content is removed. For details about the elements of contract to which security classification is assigned refer to draft Contract, Annex III, Appendix II

2.8 Volume of the contract

The maximum total contract value is 95.000€ for the first 12 months and 85.000€ for the renewals The total amount is € 350.000, including all possible renewals (max. three). The above amounts are exclusive of VAT and include the complete documentation. No interim payment shall be made. (if this is the case, delete section 2.10).

2.9 Duration of the contract

The contract duration is 12 months. The contract may be renewed up to three times according to Article I.2.4 of the Draft Contract (Annex I to these tender Specifications).

In principles, the overall duration above cannot be extended. The Contractor is deemed solely responsible for delays occasioned by sub-contractors or other third parties (except for rare cases of force majeure). Adequate resources and appropriate organisation of the work, including management of potential delays should be put in place in order to observe the duration specified above.

2.10 Place of delivery/execution

2.11 Deliverables

Deliverables shall be delivered at EDA premises in Brussels, Belgium Meetings and training shall normally be held at EDA premises, unless otherwise indicated in this document or agreed between the two parties. Reporting

A Final report has to be delivered at the end of the 12-month duration to EDA's Project Team CIS. The Format will be 2 hardcopies plus 29 CDs/DVDs. The reports will be the basis for the respective acceptance certificate, and corresponding payment.

The same reporting structure applies for each renewal of the contract.

2.12 Variant solutions

Not applicable.

3 Exclusion and selection criteria

3.1 Exclusion criteria

Participation to this tender is only open to tenderers who are not in one of the situations listed below:

- a) 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) have been convicted of an offence concerning their professional conduct by a judgement which has the force of res judicata;
- c) have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- d) 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) have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organization 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 a serious breach of contract for failure to comply with their contractual obligations.

In addition to the above, contracts may not be awarded to tenderers who, during the procurement procedure:

- are subject to a conflict of interest;
- are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

Means of proof required

Tenderers, **including all consortium members and all sub-contractors where applicable**, shall provide a declaration on their honour (see model in **Annex IV**), duly signed and dated, stating that they are not in one of the situations referred to above.

Nota bene:

The tenderer to whom the contract is to be awarded shall provide, within 15 days following notification of award and preceding the signature of the contract, the following documentary proofs to confirm the declaration referred to above:

- For points a), b) and e) 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.
- For point d) a recent certificate issued by the competent authority of the State concerned.

Where the document or certificate referred to above is not issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

3.2 Selection criteria

The tenderers must submit evidence of their legal, economic, financial, technical and professional capacity to perform the contract.

3.2.1 Legal capacity

Requirement

The tenderers, **including all consortium members and all sub-contractors where applicable**, are asked to prove that they are authorised to perform the contract under their national law as evidenced by inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, express authorisation or entry in the VAT register.

Evidence required

Each tenderer, **including every consortium member and every sub-contractor where applicable**, shall provide a duly filled in and signed **Legal Entity Form** (see **Annex V**) accompanied by the documents requested therein.

3.2.2 Economic & Financial capacity

Requirement

The tenderer, **including every consortium member where applicable**, must be in a stable financial position and have the economic and financial capacity to perform the contract.

Evidence required

Proof of economic and financial capacity shall be furnished by the tenderer, including every consortium member, as follows:

Where publication of the Balance sheet is required under the law of the country where the economic operator is established, the tenderer shall complete and include in the offer a financial statement form (Annex VIII) to these tender specifications.

Please observe the following aspects in completing this financial statement (Annex VIII):

- It should be certified by means of a signature of the chief accounting officer of the tendering organisation
- EDA has the right during the tendering process and before awarding the contract to request further evidence on the tenderer's compliance with the economic & financial capacity requirement, in which case balance sheets and profit & loss accounts for the past financial years may be requested.
- In the case of a consortium submitting an offer, the financial statement should be included in the offer for all consortium partners.
- In the case of a physical person the financial statement should be included in the offer for where only the lines 16 and 17 need to be filled in and the financial statement can be signed by the physical person only.

If, for some exceptional reason which the EDA considers justified, the tenderer is unable to provide the information requested by the contracting authority, he may prove his economic and financial capacity by any other means which the EDA considers appropriate. EDA reserves the right to ask sub-contractors to prove their financial capacity should their share of work is substantial.

3.2.3 Technical and professional capacity

Requirement(s)

- The tenderer shall demonstrate the necessary know-how, experience and reliability to perform the contract.

The tenderer has to prove familiarity with:

- YAWL (2 projects delivered in the last 3 years)
- Liferay (1 project delivered in the last 3 years)
- PostgreSQL (1 project delivered in the last 3 years).
- The tenderer shall demonstrate experience in productively interacting with EU institutions and/or Agencies and military organisations of Member States by naming at least 2 studies or other deliverables for one of the EU institutions and/or Agencies located in Brussels during the last 3 years. At least 1 of these projects must have a direct relation to an EU OHQ or FHQ.

- The proposed team must cover the below described expertise. At least the main experts nominated have to prove experience in at least 1 of the below areas::
 - 2 years in work-flow modelling (YAWL preferred)
 - 2 years in programming relational databases (PostgreSQL preferred)

and

- 1 year in portal development (Liferay preferred)

This has to be documented in the CVs attached to the offer.

- In addition, the tenderer shall be in a position to comply with the requirements to handle classified information at level RESTREINT UE/EU RESTRICTED (as per the requirements set out in Appendix I to Annex III of the draft Contract).

Evidence required

The following documents or information must be presented as evidence of compliance with the technical and professional capacity:

- A list of the principal services (contracts, studies) corresponding in terms of scope and complexity to the services of the present call for tenders provided in the past five years.
- CVs of project team members (using the template in Annex III); including a declaration of their reliable availability and commitment for the project work.
- A commitment from the tenderer, including all consortium partners and the subcontractors already identified that they will comply with the requirements to handle classified information at level RESTREINT UE/EU RESTRICTED before the signature of the contract, and consequently, that they have or will nominate a Facility Security Officer (FSO), who will be responsible to its management for enforcing the security obligations within such an entity, and that they will appropriately safeguard the confidentiality of all classified information in their possession or coming to their notice throughout the duration of the contract and after termination or conclusion of the contract, in accordance with the basic principles and minimum standards of security laid down in the Council Decision of 31 March 2011 on the security rules for protecting EU classified information (2012/292/EU) and the contract-specific security requirements that mentioned in the Security Aspect Letters (SAL) of the future contract (see draft Contract, Annex III, Appendix I); Additionally, in case the management of classified information at level RESTREINT UE/EU RESTRICTED is envisaged to take place at their premises, the above-mentioned commitment shall include the statement that they have established in their facilities, as a minimum, an “Administrative Area” as defined in Annex II title IV of the Council Decision of 31

March 2011 on the security rules for protecting EU classified information (2012/292/ EU).

- Any other document which could demonstrate tenderer's technical and professional capacity according to the requirements set in this section;

The technical and professional capacity will be assessed in relation to the combined capacities of all the Consortium members [leader and member(s)] and the subcontractor(s), if any, as a whole.

4 Award of the contract

Only the tenders meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price.

The contract shall be awarded to the tenderer submitting the tender offering the best-value-for-money (best quality-price ratio).

4.1 Technical evaluation

The quality of each technical offer will be evaluated in accordance with the award criteria and the associated weighting as detailed in the evaluation grid below.

No	QUALITY CRITERIA	DETAILS OF THE QUALITY CRITERIA	Max points
1	Understanding of the assignment	This is to assess if tenderer has understood the assignment taking into account all the aspects of the technical specifications.	50
2	Methodology proposed for implementation	This is to assess the degree to which the methodology proposed shows the capacity to resolve the questions underlying the tender in a realistic and well-structured way as well as to whether the methods proposed are in conformity with the need of EDA and technical specifications.	20

3	Project management	This is to assess the extent to which the team set-up is suitable for the implementation of the assignment. Attention will be drawn to project management aspects such as the distribution of responsibilities within the proposed team, the internal team communication and the communication with EDA.	10
4	Quality control measures	This is to assess the quality control mechanisms put in place to guarantee the high quality of deliverables. This includes a Risk management/mitigation Plan	10
5	Meeting deadlines	This is to assess the mechanisms put in place in order to guarantee availability of contractor for assignment and to meet agreed deadlines for deliverables	10
	TOTAL		100

Interviews

The Evaluation Committee does not expect to conduct any interviews.

4.2 Technical proposal

The Tenderers shall present evidence that they are capable to deliver a high quality of training, support and written deliverables. Tenderers shall also include in their tender all detailed information and documentation to allow the Evaluation Committee to assess all the quality criteria mentioned above. The Evaluation Committee reserves the right not to attribute points when insufficient evidence is provided.

To do so, tenderers shall include in their bids, at least the following elements/information:

- a) Executive summary of the tender;
- b) Statement of Work;
- c) Project Management Plan including project schedule;
- d) All additional documentation deemed necessary from the tenderer's perspective to demonstrate the ability to meet the prescribed requirements and criteria.
- e) A description of the roles and responsibilities of the key experts (whose CVs are required under section 3.2.3)

- f) An estimate of the workload for the project team broken down by task and by role
- g) A description of the specific roles & responsibilities/ proportion of work of all consortium members/ sub-contractors (where applicable)
- h) Other information in order to assess the criteria established in section 4.1.

4.3 Technical quality threshold

Only tenders scoring 70 points or more (of a maximum of 100) points against the technical award criteria will have their financial proposal evaluated.

4.4 Financial evaluation

The evaluation will be made on the basis of the price offered in the model financial offer (Annex II) and based on the following formula:

Financial Score for “offer X” = (cheapest bid price received/price of “offer X”) * 100

Where a maximum budget is mentioned in these tender specifications, any tenderer submitting a financial proposal exceeding this budget will be rejected.

4.5 Financial proposal

- The financial proposal should be presented in the format found in **Annex II**.
- Prices must be quoted in **EURO** and include all expenses necessary to perform the contract.
- The price quoted is fixed and is subject to **NO revision**.
- Prices must be quoted free of all duties, taxes and other charges (including VAT) as the EDA is exempt from such charges under Article 3 of the Protocol on the Privileges and Immunities of the European Union.
- Costs incurred in preparing and submitting tenders are borne by the tenderer and shall not be reimbursed.

4.6 Choice of the selected tender

The most economically advantageous tender is established by weighing technical quality against price on an **70/30** basis.

The consolidated score for each candidate shall be calculated as follows:

Consolidated score= Technical Score*0,7+Financial Score*0,3

ANNEX I - DRAFT CONTRACT

ANNEX II - MODEL FINANCIAL OFFER

Prices should be all-inclusive; the Agency will not pay expenses for any additional costs incurred from the execution of the contract.

Financial proposals exceeding the amount indicated in Section 2.8 shall be excluded outright. Any financial offer exceeding 95000EUR for (1) or 85000 for (2) or 350000 for (3) will then be excluded.

Name of Tenderer:	
--------------------------	--

TOTAL COST OF ASSIGNMENT, INCLUDING ALL ASSOCIATED EXPENSES AND EXCLUDING VAT FOR YEAR ONE	(1) €
TOTAL YARLY COST OF ASSIGNMENT, INCLUDING ALL ASSOCIATED EXPENSES AND EXCLUDING VAT , (YEARLY FOR YEAR 2,3 AND 4°	(2) €
TOTAL COST OF ASSIGNMENT, INCLUDING ALL ASSOCIATED EXPENSES AND EXCLUDING VAT :	(3)=(1)+3X(2)= €

Name: (of the Tenderer or authorised representative)	Signature:	Date:

ANNEX III - CURRICULUM VITAE

To be downloaded from the following URL address:

<http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>

ANNEX IV - DECLARATION ON EXCLUSION CRITERIA

(To be completed and signed by each Consortium member and by each Sub-contractor, where applicable)

The undersigned:

Name of the individual/company/organisation:

Legal address:

Registration number/ID Card No.:

VAT number:

Declares on oath that the individual/company/organisation mentioned above is not in any of the situations mentioned below:

- 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 judgement which has the force of *res judicata*;
- c) they have been guilty of grave professional misconduct proven by any means which the EDA 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 judgement 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 European Union or the Agency's general budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.
- g) they are subject to a conflict of interest;
- h) they are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information

Full name:

Date & Signature:

ANNEX V - LEGAL ENTITY FORM

To be downloaded from the following URL address:

http://ec.europa.eu/budget/info_contract/legal_entities_en.htm

ANNEX VI - FINANCIAL IDENTIFICATION FORM

To be downloaded from the following URL address:

http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm

ANNEX VII - TENDER SUBMISSION FORM

14.CAT.OP.029

“Finalization of e-learning Standard Operating Procedures (SOP) Application Demonstrator(eSOPAD)”

One signed original of this tender submission form must be supplied.

1. SUBMITTED by (i.e. the identity of the Tenderer)

	Name(s) of legal entity or entities submitting this tender	Nationality⁴
Leader		
Member 2		
Etc ... ⁵		

2. SUBCONTRACTORS (if applicable)

	Name(s) of the legal entity or entities identified as sub-contractor(s)	Nationality
Sub-contractor 1		
Etc ... ⁶		

⁴ Country in which the legal entity is registered

⁵ If this tender is being submitted by an individual legal entity, the name of the legal entity should be entered as “Leader” (and all other lines should be deleted)

⁶ Add / delete additional lines for sub-contractors as appropriate

3. CONTACT PERSON for this tender (to act as focal point for all communication which may take place between the EDA and the Tenderer)

Name and position	
Organisation	
Address	
Telephone	
Fax	
e-mail	

4. STATEMENT

I, the undersigned, being the authorised signatory of the above Tenderer (including all consortium members, in the case of a consortium), hereby declare that we have examined and accept without reserve or restriction the entire contents of the tender specifications for the tender procedure referred to above.

We are fully aware that, in the case of a consortium, the composition of the consortium cannot be modified in the course of the tender procedure except with the prior written authorisation of the EDA. We are also aware that the consortium members would have joint and several liability towards the EDA concerning participation in both the above procedure and any contract awarded to us as a result of it.

Our tender is subject to acceptance within the validity period stipulated in point 1.7 of the Tender Specifications and is made up of the following documents:

ENVELOPE A - ADMINISTRATIVE DATA:	
▪ This Tender Submission Form	<input type="checkbox"/>
▪ The duly filled in, signed and dated Exclusion Criteria Declaration(s) by every legal entity identified under point 1 and point 2 of this Tender Submission Form	<input type="checkbox"/>
▪ The duly filled in, signed and dated Legal Entity Form (<i>using the standard template referred to in Annex V to the Tender Specifications</i>) and the supporting documents requested therein, by every legal entity identified under point 1 and point 2 of this tender submission form	<input type="checkbox"/>
▪ The duly filled in, signed and dated Financial Identification Form (<i>using the standard template in Annex VI to the Tender Specifications</i>) to nominate the bank account into which payments would be made in the event that our tender is successful	<input type="checkbox"/>
▪ Documents proving the economic and financial status (as requested in point 3.2.2 of the Tender Specifications) of every legal entity identified under point 1 and point 2 of this tender submission form	<input type="checkbox"/>
▪ Documents proving our technical and professional capacity (as requested in point 3.2.3 of the Tender Specifications) - One signed original and three copies	<input type="checkbox"/>
▪ Duly authorised signature , i.e. an official document (<i>statutes, power of attorney, notary statement, etc.</i>) proving that the person who signs on behalf of the Tenderer is duly authorised to do so	<input type="checkbox"/>
▪ Our consortium agreement/ duly signed and dated consortium statement by each of the consortium members specifying the company or person heading the project and authorised to submit a tender on behalf of the, as requested in point 1.4 of the tender specifications	<input type="checkbox"/>
ENVELOPE B - TECHNICAL PROPOSAL (one signed original and three copies and providing all information requested in point 4.2 of these specifications).	<input type="checkbox"/>
ENVELOPE C - FINANCIAL PROPOSAL (one signed original using the template in Annex II), which is submitted in a separate, sealed envelope.	<input type="checkbox"/>

Signed on behalf of the Tenderer

Name	
Signature	
Date	

ANNEX VIII – ECONOMIC AND FINANCIAL CAPACITY

(Please fill in the excel file uploaded together with the tender documents)

ANNEX IX – NON DISCLOSURE (CONFIDENTIALITY AGREEMENT)

(attached)

ANNEX X

**INFORMATION SHEET FOR POTENTIAL CONTRACTOR(S) / SUBCONTRACTOR(S)*
TENDER PROCEDURE 14.CAT.OP.029**

I,(name of the legal entity submitting this tender), the undersigned, declare the below information I provide for this tender is true and complete.

REQUEST	
I. <u>Facility particulars</u>	
1. Full facility name :	
2. Full facility physical address :	
3. Mailing address (if different from 2) :	
4. Zip code / city / country :	
5 Security officer Name : Phone # : Fax # : e-mail : *****	
II. <u>Security requirements</u> **	
<input type="checkbox"/> Holds or is in condition to hold a FSC before the awarding date of the contract At level <input type="checkbox"/> Secret-UE / EU Secret <input type="checkbox"/> Confidentiel UE / EU Confidential	
With safeguarding of classified documents : <input type="checkbox"/> yes, At level <input type="checkbox"/> Secret-UE / EU Secret <input type="checkbox"/> Confidentiel UE / EU Confidential	
<input type="checkbox"/> no.	
<input type="checkbox"/> Does not need a FSC since it will not be provided with or granted access to classified information at level Confidentiel UE / EU Confidential or above	
<input type="checkbox"/> Complies with the Security requirements to handle Restreint UE/EU Restricted information at its premises.	
<input type="checkbox"/> Will not be provided with classified information at Restreint UE/EU Restricted level.	
REMARKS :	
SIGNATURE ON BEHALF OF THE TENDERER	
Name : Date :	

* Please use one form per contractor/subcontractor;
** Please tick the appropriate box(es)