



ANNEX A

D-SE-17-T02

Roma and Travellers Survey 2018

TENDER SPECIFICATIONS

Annex A – Tender Specifications

1. Description of the tender

The overall objective of the contract is the implementation of a nationwide Roma face-to-face survey in eleven (11) EU Member States as defined in Annex A.1 – Technical Specifications in order to collect comparable data on the living conditions and fundamental rights situation of persons who self-identify as Roma and Travellers. The findings will provide evidence on progress made in Roma integration efforts to EU institutions and Member States and will be used to populate indicators to assist policy makers and other stakeholders in the review of the Europe 2020 strategy.

The contract notice for the present call for tenders was published on 18/07/2017 with reference number 2017 / S 135-275921.

2. Division into lots

This tender is not divided into lots. Submission of a tender for only some of tasks to be performed under the contract will lead to the rejection of the tender.

3. Purpose of the tender

The purpose of this invitation to tender is to award a Direct Services contract for the provision of the Roma and Travellers Survey 2018.

4. Place of delivery or performance

The place of performance of the tasks shall be the contractor's premises or any other place indicated in Annex A.1 Technical Specifications.

5. Duration

The contract(s) resulting from the present call for tenders shall enter into force the date on which it is signed by the last contracting party.

The duration of the performance of the contract must not exceed **nineteen (19) months**. Performance of the contract starts from the date of entry into force of the contract. The period of performance of the contract may be extended only with the express written agreement of the parties before the expiration of such period.

The performance of the contract is divided into two (2) phases as described in detail in Annex A.1 – Technical Specifications.

Phase 1 shall enter into force on the date the contract is signed by the last contracting party. The decision to initiate Phase 2 lies with the contracting authority and cannot be guaranteed at the time of contract signature. The contractor will be authorised to start implementation of Phase 2 provided that the funding necessary is available in the budget of the contracting authority and upon approval by the contracting authority of all country-specific pilot reports and the final pilot report (Deliverable 7) as indicated in Annex A.1 – Technical Specifications. The contracting authority shall inform the contractor about its consent to initiate Phase 2 by a written notice in advance.



Annex A – Tender Specifications

6. Volume

The maximum estimated contract amount is 2,100,000.00 EUR excluding VAT, divided in phases as follows:

- Phase 1: € 500.000,00
- Phase 2: € 1.600.000,00

The contracting authority may exercise the option to increase the estimated contract amount via negotiated procedure with the economic operator to whom the contract is awarded in accordance with Article 134 (1) (e) and 134 (4) of the Rules of Application of the Financial Regulation¹.

7. Contractual conditions

The tenderer should bear in mind the provisions of the draft contract which specifies the rights and obligations of the contractor, particularly those on payments, performance of the contract, retention money guarantee, confidentiality, and checks and audits.

8. Compliance with applicable law

The tender must comply with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU².

9. Terms of payment

The payment arrangements governing the contracts resulting from the present call for tenders are detailed in the relevant articles of Annex B – draft contract. Tenderers are strongly advised to carefully read those articles before submitting their tenders.

10. Financial guarantees

No tender guarantee is required.

Based on a risk assessment, the contracting authority may request a pre-financing guarantee in the amount of the pre-financing and in the form set out in Annex C.

No performance guarantee will be required.

¹ Commission Delegated Regulation (EU) No 1268/2012 of 29 October 2012 on the rules of application of Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council on the financial rules applicable to the general budget of the Union, as amended.

² Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2004/18/EC (OJ L 94, 28.3.2014, p. 65).



Annex A – Tender Specifications

11. Participation in the tendering procedure

Participation in this procurement procedure is open on equal terms to all natural and legal persons coming within the scope of the Treaties, as well as to international organisations.

It is also open to all natural and legal persons established in a third country which has a special agreement with the Union in the field of public procurement on the conditions laid down in that agreement³.

For British tenderers:

Please be aware that after the UK's withdrawal from the EU, the rules of access to EU procurement procedures of economic operators established in third countries will apply to tenderers from the UK depending on the outcome of the negotiations. In case such access is not provided by the legal provisions in force, tenderers from the UK could be rejected from the procurement procedure.

12. Joint tenders

A joint tender is a situation where a tender is submitted by a group of economic operators (natural or legal persons). Joint tenders may include subcontractors in addition to the members of the group. Changes in the composition of the consortium or group of companies must be expressly authorised by the contracting authority.

In case of joint tender, all members of the group assume joint and several liability towards the contracting authority for the performance of the contract as a whole, i.e. both financial and operational liability. Nevertheless, tenderers must designate one of the economic operators as a single point of contact (the leader) for the contracting authority for administrative and financial aspects as well as operational management of the contract.

All members of the consortium or group of companies must provide a declaration on honour on exclusion and selection criteria duly dated and signed by an authorised representative.

After the award, the contracting authority will sign the contract either with all members of the group, or with the leader on behalf of all members of the group, authorised by the other members via powers of attorney.

Joint tenders will be assessed as follows as regards the exclusion and selection criteria:

- The exclusion criteria will be assessed in relation to each economic operator individually.
- The selection criteria for economic and financial capacity will be assessed in relation to each economic operator individually. However, economic and financial criteria that shall be achieved above a certain minimum threshold (as specified in

³ Please note that the European Union Agency for Fundamental Rights is not part of the Agreement on Government Procurement (GPA) concluded within the World Trade Organisation. Therefore, the Agency's procurement procedures are not open to tenderers from GPA countries.



Annex A – Tender Specifications

the selection criteria mentioned below) will be assessed in relation to the consortium or group of companies as a whole.

The selection criteria for technical and professional capacity will be assessed in relation to the consortium or group of companies as a whole.

13. Subcontracting

Subcontracting is permitted but the contractor will retain full liability towards the contracting authority for performance of the contract as a whole. During contract performance, the change of any subcontractor identified in the tender or additional subcontracting will be subject to prior written approval of the contracting authority.

Any intention to subcontract part of the contract must be clearly stated by the tenderer in Annex C. Tenderers must indicate the maximum percentage of the contract they intend to subcontract and the identity of those subcontractors they intend to work with.

For each subcontractor identified in the tender, tenderers must provide a Letter of Intent signed by the subcontractor stating their unambiguous undertaking to collaborate with the tenderer.

Offers involving subcontracting will be assessed as follows:

- The exclusion criteria of all identified subcontractors whose intended share of the contract is above 10% will be assessed. The declaration on honour on exclusion criteria and selection criteria included in Annex C, duly signed and dated, stating that the subcontractor is not in one of the exclusion situations, must be provided by each identified subcontractor.
- Where the tenderer relies on the economic, financial, technical and professional capacity of the identified subcontractor(s) to meet the selection criteria, subcontractors shall be treated as if they were partners in a consortium or a group of companies for the purposes of the evaluation of the selection criteria, and therefore, they shall provide proof of economic, financial, technical and professional capacity as well.
- Subcontractor(s) should select the 'N/A' option in their individual declaration when the tenderer does not rely on their economic, financial, technical and professional capacity.

Tenderers must inform the subcontractor(s) and include in their Letter of Intent that the provisions referring to checks and audits included in the Draft Contract (Annex B) may be applied to them.

Once the contract has been signed, the provisions regarding subcontracting included in the Draft Contract will apply. The contracting authority retains the right to approve or reject the proposed subcontractors.

If the tender includes subcontracting, it is recommended that contractual arrangements with subcontractors include mediation as a method of dispute resolution.



Annex A – Tender Specifications

14. Visits to premises

A visit to the premises is not foreseen.

15. Date and place of opening of the tenders

Tenders will be opened at 10:30 hrs on **03/10/2017** at the contracting authority's address. An authorised representative of each tenderer may attend the opening of the bids. Companies wishing to attend are requested to notify their intention by sending a fax or e-mail at least three (3) working days in advance to the fax or e-mail. This notification must be signed by an authorised officer of the tenderer and specify the name of the person who will attend the opening of the bids on the tenderers behalf.

16. Contacts between the tenderer and the contracting authority

In principle, no contact is permitted between the contracting authority and the tenderers during the tendering procedure.

However, in exceptional circumstances contact may be made on the tenderers initiative before the final date for the submission of bids, in order (and only for this reason) to clarify the nature of the contract.

Such requests for further information may be made by fax, e-mail or to the address below:

| |
|--|
| <p>European Union Agency for Fundamental Rights Invitation to tender No: D-SE-17-T02 Administration Schwarzenbergplatz 11 Vienna 1040 – Austria Fax: +43 (0) 150 31 382 ; e-mail: procurement@fra.europa.eu</p> |
|--|

The contracting authority is not bound to reply to requests for additional information provided less than six working days before the date of receipt of tenders. The answers to the requests for additional information will be posted on <http://fra.europa.eu/en/about-fra/procurement>. The website will be updated regularly and it is the tenderers' responsibility to check for updates and modifications during the tendering period.

Similarly, contact may in exceptional circumstances be made on the contracting authority's initiative:

- a. before the final date for the submission of bids, in order to inform interested parties of an error, a lack of precision, an omission or any other material shortcoming in the drawing up of the documents of the invitation to tender; or
- b. after the opening of bids, where a bid requires clarification or in order to correct material errors made in drawing up a bid.

Please note that in any event such contact may not result in a modification of the terms of the bid.



Annex A – Tender Specifications

17. Alteration or withdrawal of tenders

Tenderers may alter or withdraw their tenders by written notification prior to the deadline for submission of tenders. No tender may be altered after the deadline for submission. Withdrawals must be unconditional and will end all participation in the tender procedure.

Any such notification of alteration or withdrawal must be prepared and submitted in accordance with the instructions on how to submit tenders included in the Invitation to tender, and the envelope must also be marked with "alteration" or "withdrawal" as appropriate.

18. Variants

Variant solutions are not allowed and will not be taken into consideration.

19. Evaluation and award

The evaluation is based solely on the information provided in the submitted tender. It involves the following:

- phase I: verification of non-exclusion of tenderers on the basis of the exclusion criteria
- phase II: selection of tenderers on the basis of compliance with the selection criteria
- phase III: verification of compliance with the minimum requirements set out in Annex A.1 Technical Specification and evaluation of tenders on the basis of the award criteria
- phase IV: contract award on the basis of the award method

The contracting authority may reject abnormally low tenders, in particular if it established that the tenderer or a subcontractor does not comply with applicable obligations in the fields of environmental, social and labour law.

The tenders will be assessed in the order indicated above. Only tenders meeting the requirements of one step will pass on to the next step.

19.1 Verification of non-exclusion (Phase I)

All tenderers must provide a declaration of honour on exclusion criteria and selection criteria (see Annex C), signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in that declaration of honour.

The successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour (including exclusion and selection criteria) before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender and to all subcontractors whose share of the contract is above 10 % and whose capacity is necessary to fulfil the selection criteria.



Annex A – Tender Specifications

The obligation to submit supporting evidence does not apply to international organisations.

The successful tenderer (or a member of the group in case of joint tender, or a subcontractor) will not be required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the contracting authority and are still valid at that date. In such cases, the successful tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that there has been no change in its situation. If a specific document can be accessed by the contracting authority on a national database free of charge, the successful tenderer (or a member of the group in case of joint tender, or a subcontractor) will need to include the link to the source and will not be required to submit the document.

19.2 Selection of tenders on the basis of compliance with selection criteria – Phase II

The aim of this phase is to assess if tenderers have sufficient economic and financial capacity and sufficient technical and professional capacity to perform the contract.

19.2.1 Economic and financial capacity

Tenderers must have the necessary economic and financial capacity to perform this contract until its end. In order to prove their capacity, tenderers must comply with the following selection criteria:

(a) Copy of the financial statements (balance sheets, and profit and loss accounts) for the last two (2) financial years for which accounts have been closed. In case of a consortium, each consortium member shall present their own financial statements.

(b) A statement of the annual average turnover for the last two (2) financial years for which accounts have been closed. The minimum average annual turnover of the tenderer shall be of 2,650,000.00 EUR. In case of a consortium, the annual average turnover for each of the partners shall be presented. The sum of the annual average turnovers of each partner will be taken into account to reach the minimum annual average turnover of 2,650,000.00 EUR.

If, for some exceptional reason which the contracting authority considers justified, a tenderer is unable to provide one or other of the above documents, it may prove its economic and financial capacity by any other document which the contracting authority considers appropriate. In any case, the contracting authority must at least be notified of the exceptional reason and its justification. The contracting authority reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

An economic operator may, where appropriate and for a particular contract, rely on the economic and financial capacities of other entities, regardless of the legal nature of the links it has with them. It must in that case prove to the contracting authority



Annex A – Tender Specifications

that it will have at its disposal the resources necessary for the performance of the contract, for example by producing a commitment by those entities to that effect. In that case, the contracting authority may require that the economic operator and the entities referred to above are jointly liable for the performance of the contract.

19.2.2 Technical and professional capacity

Tenderers (in case of a joint tender the combined capacity of all members of the group and identified subcontractors) must comply with the criteria listed below:

(a) The educational and professional qualifications, skills, experience and expertise of the persons responsible for the performance of the contract.

Tenderers are requested to include the CVs in Europass format and signed selection grids of **at least** the following profiles described in Section 8 of Annex A.1 - Technical Specifications:

- One (1) Project Coordinator
- One (1) Senior Survey Expert
- One (1) Senior Sampling and Weighting Expert
- One (1) National Survey Expert for each of the eleven (11) EU Member State where the survey will be carried out.

A different National Survey Expert shall be assigned to each of the countries where the survey will be carried out.

The proposed CVs must possess the minimum educational and professional requirements stated in Section 8 of Annex A.1 - Technical Specifications.

(b) A list of the principal services provided and supplies delivered in the past five (5) years, with the sums, dates and clients, public or private. Tenderers are required to prove that they have performed at least three (3) large-scale multi-country surveys of an amount, nature or scope similar to the services to be carried out under this contract in the last five (5) years.

An economic operator may, where appropriate and for a particular contract, rely on the technical and professional capacities of other entities, regardless of the legal nature of the links it has with them. It must in that case prove to the contracting authority that it will have at its disposal the resources necessary for the performance of the contract, for example by producing a commitment by those entities to that effect.

An economic operator may only rely on the capacities of other entities where the latter will perform the works or services for which these capacities are required.

20. Assessment of tenders – Phase III

The aim of this phase is to verify the compliance of the tenders with the minimum requirements set out in Annex A.1 Technical Specifications and to evaluate, from the technical and the financial points of view the offers submitted by the tenderers.



Annex A – Tender Specifications

20.1 Verification of compliance with the minimum requirements set out in Annex A.1 Technical Specifications.

In their technical offers, tenderers must show compliance with the minimum requirements set out in section 10 of Annex A.1 Technical Specifications. Compliance with these minimum requirements will be assessed. Offers deviating from the minimum requirements or not covering all the minimum requirements may be rejected on the basis of non-compliance and will not be evaluated further

20.2 Technical evaluation

The quality of the tender will be evaluated based on the following criteria and their corresponding weightings. In their technical proposals, tenders must include all the information required by the contracting authority to evaluate their tenders, as described below:

| Technical Award criteria/sub-criteria | Weighting in % |
|--|----------------|
| (a) Project Management | 25 |
| (a.1) Work programme The tenderer shall describe in their technical offer with particular attention to the preparatory work, background research and development of survey strategies: <ul style="list-style-type: none">- how they will implement the key stages of the project, their duration and milestones according to Annex A.1 –Technical Specifications;- what measures they will take to ensure the quality and meet the deadlines for milestones in all stages of the project in each country;- what measures they will take to mitigate risks associated with the implementation of the project activities. | 60 |
| (a.2) Organisation of the project team The tenderer shall describe in their technical offer: <ul style="list-style-type: none">- What is the composition of the proposed project team outlining each team members' expertise, the balance of skills and competences;- How they will allocate roles and responsibilities for project activities in each Member State, as described in sections 4 and 5 of Annex A.1 – Technical Specifications; please include an indication of the time (in working days) that each team member will devote to the different survey activities;- What will be the organisational structure of the proposed project team;- How the project team members will communicate effectively to ensure coordination of the work across all Member States, where the project will be implemented, and with FRA. | 40 |



Annex A – Tender Specifications

| | |
|--|-----------|
| (b) Project Methodology | 75 |
| <p>(b.1) Background reasearch and consultation with stakeholders</p> <p>The tenderer shall describe in their technical offer:</p> <ul style="list-style-type: none"> - How they will conduct background research in order to map the target population comprehensively taking into account its diversity; - Steps and approaches they will take to consult with national experts and communities; - How the outcome of the background research will be linked to the subsequent project activities. | 20 |
| <p>(b.2) Sampling and survey design</p> <p>The tenderer shall describe in their technical offer:</p> <ul style="list-style-type: none"> - How they will select and propose specific sampling approaches and survey strategies to FRA for each survey country aiming for national coverage of the target population and representativeness of the sample, as well as comparability between countries (tenderers should consult Table 4 in Annex A.1 – Technical Specifications with indicative net sample sizes per country and take into account optimal allocation of sample sizes in Activity 3 Annex A.1 - Technical Specifications) ⁴; - How they will implement the sampling strategy and select respondents; - How they will develop weighting plans. | 30 |
| <p>(b.3) Survey implementation</p> <p>The tenderer shall describe in their technical offer:</p> <ul style="list-style-type: none"> - The <u>technical infrastructure</u> they will put in place for the survey implementation, including the central management of data and data quality control; - The <u>survey systems</u> they will use explaining how quality and field controls will be implemented; - How they will achieve a high level of complementarity and consistency between auxiliary data, metadata, paradata, and data collected through the survey sample management system and during the interview; for example, tenderers could use an integrated system for interviewing and survey sample management; - How they will store, handle and process any personal and sensitive data, including paradata, and what measures will be applied to <u>ensure</u> | 20 |

⁴ Tenderers can receive the EU-MIDIS II questionnaire upon request for the preparation of the tender by sending an email to procurement@fra.europa.eu. This measure is intended to facilitate tenderers in developing a technical and financial offer. Tenderers cannot disclose or share the questionnaire in any form to any third party.



Annex A – Tender Specifications

| | |
|--|------------|
| <p><u>their security and compliance with data protection rules;</u></p> <ul style="list-style-type: none"> - How the tenderer will ensure the use of the appropriate language in the interviews, for example by facilitating interviewers to switch the language of the interview or support the respondent to use a language they understand; - How the tenderer will recruit interviewers that allows for: (1) matching with respondents in respect to Roma ethnic origin, as appropriate; (2) matching other characteristics, such as gender and certain language skills (bilingual); (3) using, as necessary, pairs of interviewers for cultural or safety reasons; - How they will train interviewers to comply with the highest ethical standards for survey research on ethnic minorities; tenderers should take into account that interviewers may expect remuneration for activities, such as screening and collecting of meta- and paradata; - How they will ensure the cooperation of survey respondents, as well as other actors, such as NGOs, assistant-interviewers, facilitators and local mediators for any support they provide. | |
| <p>(b.4) Draft quality assurance, monitoring, documentation and reporting</p> <p>The tenderer shall describe in their technical offer:</p> <ul style="list-style-type: none"> - Their quality assurance and monitoring plan for project implementation, including, for example, the quality objectives, control and management of documents and data (records), quality control procedures for each project activity, contingency measures in case of failing assumptions for survey strategies, contingency measures in case of imbalanced distribution of respondents in the sample, monitoring of key indicators and remedies for eventual problems. - The technical set up of a documentation, monitoring and reporting system to ensure that all data and information on project activities are systematically stored and can be easily and quickly retrieved on request and documented consistently. | 30 |
| TOTAL | 100 |

For each criterion (and sub-criterion) a number of points in a range between 0 to 100 points will be given. A tender can reach a maximum of 100 points per criterion and a maximum of 100 points in total. After the application of the corresponding weightings per criterion and sub-criterion as per the grid above, tenders scoring less than 60% in the total overall points or less than 50% in the points awarded for a single criterion will be excluded from the rest of the assessment procedure.

20.3 Financial evaluation

20.3.1 Financial award criteria

The tender with the lowest financial offer will receive 100 points in the financial evaluation. The remaining tenders will receive lower price indicators in proportion to their prices and in accordance with the following formula:



Annex A – Tender Specifications

$$\text{financial score for tender } X = (\text{lowest price} / \text{price of tender } X) * 100$$

20.3.2 Information concerning prices

The financial evaluation of the offers will be based on the prices quoted by the tenderers in their financial offers. Tenderers must fill in the Financial Offer Form included in Annex C.

When filling in the Financial Offer Form, tenderers must take into consideration that prices shall be:

- expressed in euro. For tenders in countries which do not belong to the euro zone, tenderers shall quote their prices in euro and the price quoted may not be revised in line with exchange rate movements. It is for the tenderer to select an exchange rate and assume the risks or benefits deriving from any variation.
- inclusive of all costs and expenses, directly and indirectly connected with the goods and/or services to be supplied/provided and including all the charges (travel and subsistence), unless otherwise stated in the tender documents.
- free of all duties and taxes (in particular VAT). According to Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, the European Union Agency for Fundamental Rights is exempt from all charges, taxes and dues, including value added tax; such charges may not therefore be included in the calculation of the price quoted; the VAT amount must be indicated separately.

Prices are fixed and not subject to revision.

21. Contract award – Phase IV

The contract will be awarded to the most economically advantageous tender, i.e. the tender offering the best price-quality ratio determined in accordance with the formula below quality-price ratio:

$$\text{Score for tender } X = (\text{financial score of tender } X * 40 \%) + (\text{total quality score (out of 100) for all award criteria of tender } X * 60 \%)$$

22. Information to tenderers on the outcome of the tender

The contracting authority will inform tenderers of decisions reached concerning the award of the contract, including the grounds for any decision not to award a contract or to recommence the procedure.

The contracting authority will inform as soon as possible all tenderers whose tenders are rejected of the reasons for their rejection. If a written request is received, the contracting authority will inform, within not more than 15 calendar days from the date on which the written request is received, all tenderers who meet the exclusion and selection criteria, of the characteristics and relative advantages of the successful tender and the name of the tenderer to whom the contract is awarded.

However, certain details may not be disclosed where disclosure would hinder application of the law, would be contrary to public interest or would harm the



Annex A – Tender Specifications

legitimate commercial interests of public or private undertakings or could distort fair competition between those undertakings.

23. No obligation to award the contract

The tendering procedure shall not involve the contracting authority in any obligation to award the contract.

No compensation may be claimed by tenderers whose tender has not been accepted, including when the contracting authority decides not to award the contract.

24. Cancellation of the tender procedure

In the event of cancellation of the tender procedure, tenderers will be notified of the cancellation by the contracting authority. If the tender procedure is cancelled before the outer envelope of any tender has been opened, the unopened and sealed envelopes will be returned to the tenderers.

In no event shall the contracting authority be liable for any damages whatsoever including, without limitation, damages for loss of profits, in any way connected with the cancellation of a tender procedure even if the contracting authority has been advised of the possibility of damages.

25. How to submit the tender

All tenders must be presented in three parts:

Part 1 – Administrative Proposal

In the Administrative Proposal, tenderers must include all the information and documents required by the contracting authority for the assessment of tenderers on the basis of the exclusion and selection criteria described above. For that purpose, tenderers must fill and sign the following documents using the forms included in Annex C:

Section A: Tenderers Identification

- Tenderers identification form (administrative details). If the tenderer is a consortium or a group of companies, only the leader must fill in the form.
- Legal Entities Form, to be signed by a representative of the tenderer authorised to sign contracts with third parties. There is one form for individuals, one for private entities and one for public entities. If the tenderer is submitting a joint offer, a Legal Entities Form must be submitted by each consortium or group member. It also has to be submitted by each identified subcontractor whose intended share of the contract is above 10% of the total contract value.
- Bank Identification Form filled in and signed by an authorised representative of the tenderer and its banker. In case of a joint offer, only one of the members of the consortium or group of companies, usually the leader, must complete the Bank Identification Form.



Annex A – Tender Specifications

- Power of Attorney (in case of joint offers). In case of a joint offer, the power of attorney has to be signed by the leader and all consortium partners, preferably in a single document.
- Statement on Subcontracting, indicating the intention of the tenderer to subcontract part of the contract and the percentage of subcontracting per identified subcontractor.
- Letter of Intent of identified subcontractors (only if the tenderer intends to subcontract part of the contract).

Section B: Exclusion Criteria information

- Declaration of Honour with respect to the Exclusion Criteria and Absence of Conflict of Interest. To be submitted by each consortium or group member in case of joint offers and by each identified subcontractor whose intended share of the contract is above 10% of the total contract value.

Section C: Selection Criteria (Economic and Financial capacity)

- Copy of the financial statements (balance sheets, and profit and loss accounts) for the last two (2) financial years.
- Statement on the annual average turnover for the last 2 years.

Section D: Selection criteria (Technical and Professional Capacity)

- Educational and professional qualifications of the profiles requested in Annex A.1 Technical Specifications.
- List of principal services performed or supplies delivered in the last five (5) years.

Part 2 – Technical proposal

In the Technical Proposal, tenderers must include all the information required by the contracting authority for the evaluation of tenders on the basis of the technical award criteria described in the corresponding sections of these Tender Specifications. Tenderers should elaborate on all points addressed in Annex A.1 Technical Specifications in order to obtain as many points as possible. The mere repetition of mandatory requirements set out in Annex A.1, without going into details or without giving any added value, will only result in a low number of points. In addition, if certain essential points of Annex A.1 are not expressly covered by the tender, the contracting authority may decide to give a zero mark for the relevant qualitative award criteria.

The technical offer must be written with a lay person in mind. The style and presentation must, as far as is possible, be simple and clear, and free of jargon that obscures rather than promotes meaning to readers unfamiliar with it.

The technical proposal must be included in a separate envelope clearly marked as "Technical Offer". Please note that there is no specific form to present your Technical Offer. However, it should be drawn up following the instructions above.



Annex A – Tender Specifications

Part 3 – Financial Proposal

In the Financial Proposal tenderers must indicate their financial offers by completing the Financial Offer Forms included in Annex C (Section F). Prices must be included in accordance with the instructions given in the corresponding sections of these Tender Specifications. The Financial Proposal must be included inside a separate envelope clearly marked as “Financial offer”.

26. Data protection

Processing your reply to the invitation to tender will involve the recording and processing of personal data (such as your name, address and CV). Such data will be processed pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data. Unless indicated otherwise, your replies to the questions and any personal data requested are required to evaluate your tender in accordance with the specifications of the invitation to tender and will be processed solely for that purpose by the contracting authority. You are entitled to obtain access to your personal data on request and to rectify any such data that is inaccurate or incomplete. If you have any queries concerning the processing of your personal data, you may address them to contracting authority’s Data Protection Officer. You have the right of recourse at any time to the European Data Protection Supervisor for matters relating to the processing of your personal data.

27. Intellectual Property Rights (IPR)

The tenderer is strongly advised to carefully read the IPR clauses included in Annex B Draft Contract regarding modes of exploitation of the results and ownership and transfer of pre-existing rights.

In the tender, all quotations or information originating from other sources and to which third parties may claim rights have to be clearly marked (source publication including the date and place, creator, number, full title, etc.) in a way allowing easy identification.

