EUROPEAN COMMISSION
EUROSTAT

Directorate C: National Accounts, Prices and Key Indicators

ORIGINAL EN

Unit C4: Key indicators for European policies

Invitation to tender for the supply of informatics and statistical services

DATABASE MANAGEMENT AND RESEARCH ACTIVITIES RELATED TO THE PRODUCTION OF PRINCIPLE EUROPEAN ECONOMIC INDICATORS (PEEIS)

ESTAT/C/2013/010

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SECTION 1 INTRODUCTION

1.1 Presentation of Eurostat

Eurostat is a Directorate-General of the European Commission ("Commission"). Its mission is to provide the European Union with a high quality statistical information service.

Together with the national statistical offices, Eurostat is responsible for the European statistical system: see Regulation (EC) No 223/2009 of the European Parliament and of the Council of 11 March 2009 on European statistics (OJ L 87/164, 31.3.2009). Eurostat implements standards, methods and classifications for the production of comparable, reliable and relevant data. Users of Eurostat's output include the Commission and other institutions of the European Union, national governments of the Member States, international organisations, businessmen, universities and a wide range of other users. Eurostat also supports non-member countries, including the candidate countries, in adapting their statistical systems.

Eurostat carries out some of its activities by awarding contracts for the provision of services relating to the various fields of the Community statistical programme.

1.2 Subject of the contract

This invitation to tender covers:

Database management and research activities related to the production of Principle European Economic Indicators (PEEIs).

The statistical services forming the subject of this invitation to tender comprise one single lot.

Glossary

DG ECFIN	The European Commission's Directorate-General for Economic and Financial Affairs
EA(Euro Area)	The economic and monetary union of EU member states that use the Euro
ECB	European Central Bank
Euro-indicators/PEEIs	A dedicated section of Eurostat website for business cycle analysts
Euroind	A database for business cycle analysts created by Eurostat
Fame	Fame (Forecasting Analytic Modelling Environment) is a software environment for storing and managing real-time and high-volume time series data.
GDP	Gross Domestic Product at market prices
MDT	An internal Eurostat Oracle-based IT system for the management of multidimensional objects
PEEIs	Principal European Economic Indicators
SE (Statistics Explained)	A wiki-style encyclopaedia of European statistics
VAR	Vector auto regression

SECTION 2 TECHNICAL INFORMATION

2.1 General information and objectives

In 1998, Eurostat launched an initiative on short-term statistics with the creation of a set of templates for selected indicators freely available on the Eurostat website; this set of series was called "Euro-Indicators". This initiative was extended in 1999 through the creation of a restricted site Euro-SICS. All these activities led in July 2001 to the opening of the Euro-Indicators website, which constitutes a portal for business cycle analysts and researchers as well as for media, interested citizens, and students. Currently the website is called Euro-indicators/PEEIs (Principal European Economic Indicators) and is accessible at:

http://epp.eurostat.ec.europa.eu/portal/page/portal/euroindicators/peeis.

Euro area statistics are a major priority for policy makers, decision-makers, market analysts and business cycle experts. Euro area is the newest economic entity characterised by a common monetary policy and a common political strategy. As a consequence, euro area indicators can be able to influence markets and to play an active role in the process of world economic stabilisation and growth; this is why they are one of the main priorities of Eurostat. One of the responsibilities of unit C4: Key indicators for European policies, is to be in charge of all activities related to the management, co-ordination, and development of such indicators.

In this context, the management, improvement and monitoring of the Euro-Indicators database, which is a part of the Eurostat dissemination environment accessible also from the Euro-Indicators/PEEIs special topic and its exhaustive documentation represent an essential objective to be achieved.

Euro-Indicators supply a large amount of information about the state of the business cycle together with a quality assessment of PEEIs and a selection of up-to-date economic, econometric and statistical papers in the field of business cycle statistics. All such information must be regularly updated and attentively selected.

Statistics are used as a daily reference and source of information to interpret how economic and social phenomena are evolving. Users require more and more timely statistical information in order to increase their ability to monitor the economic situation. From the start of the euro area, Eurostat has worked in developing and improving a set of Principal European Economic Indicators (PEEIs) which, since 2007, are presented in a webpage bringing together a set of the most relevant and timely short-term economic indicators for the euro area and the European Union, showing the latest evolution of euro area economy. Eurostat has decided to redesign the PEEIs page, extend its data coverage and also its country coverage. Soon the PEEIs page will be available for all member states.

The on-going crisis has made the economic situation a public concern of high priority. At the same time the rapid pace of improvement in information technology allows a broadening of the potential audience for Eurostat products while making them more accessible and attractive to users. In this situation Eurostat has decided to investigate the plausibility of producing a new daily indicator of economic activity. The possibility of taking advantage of modern dissemination channels is foreseen – this indicator will be particularly targeted at mobile devices.

Currently, there is no existing international statistical guidance that provides the best practice and harmonized principles on the construction of economic daily indicators therefore it is the purpose of this call to do initial investigation into several possible methods of construction. The possibility of including daily sectorial indices for several relevant sectors will also be investigated.

The objectives of this contract are thus:

- Extension and maintenance of the PEEI historical database
- Performing revision analysis on selected indicators
- Maintenance of PEEI survey data available from ECFIN
- Drafting of methodological working papers
- Regular production of PEEI data, tables and graphs
- Regular production of the Eurostatistics publication
- Development and production of a daily economic indicator
- Designing and prototyping an interactive tool for cyclical monitoring

2.2 Volume of the contract

The overall duration of execution of the tasks will be 3 years, divided into 3 contracts covering work periods of 12 months each. The estimated volume of the tasks is estimated to be 430 person-days for each year of the contract.

2.3 Tasks and expected results

Task 1- Management and improvement of the PEEIs historical database

The historical database is an MDT-based database that contains multiple vintages for a number of indicators. The contractor will be expected to:

- progressively extend the coverage of the database to all Euroind,
- ensure the regular update (on a monthly basis) of the vintages,
- extend the historical database also to annual data conditional to the availability of vintages from production units,
- maintain the database - ensure the full compatibility of the historical database with the latest version of MDT or migrate to a new product in case MDT is replaced.

(Additional related documents are available here. https://circabc.europa.eu/w/browse/80d80a6d-d134-45d7-8624-303c739ee225)

The contractor will produce each year of the contract the following deliverables for Task 1, where T is the date of the signature of the contract:

- D1 monthly report on possible errors in vintages,
- D2 monthly delivery of the updated version of the database,
- D3 quarterly report on the progress made in extending database coverage – at the end of each quarter,
- D4 annual technical report on database maintenance and upgrade to new MDT versions – T + 12.

Task 2- Producing - on a quarterly basis - standard revision analysis on PEEIs and other key indicators

The aim of this task is to apply revision analysis techniques in order to better understand and possibly improve the quality of indicator production. Concerned indicators will be the PEEIs and annual GDP and its main components. In particular the contractor will be expected to:

- develop in cooperation with Eurostat a standard template to be used to produce and disseminate regular revision analysis,
- agree with Eurostat for each quarter the list of indicators to be used as input for the revision analysis,
- carry out the revision analysis for the agreed indicators,
- prepare tables and graphs and the relating short comments on revision analysis according to the template agreed with Eurostat,
- prepare all materials necessary for the dissemination of revision analysis outcomes in SE and/or in PDF format.

The contractor will produce each year of the contract the **following deliverables for Task 2, where T is the date of the signature of the contract**:

- D5 only for first year standard template for revision analysis – T+1,
- D6 quarterly delivery of revision analysis reports (comments, graphs and tables for SE and in PDF format) at the end of each quarter,
- D7 annual report on possible improvements of revision analysis at T + 12.

Task 3- Regular updating of business and consumer surveys indicators

Business and consumer surveys are regularly sent to Eurostat by DG ECFIN to be updated in the Euro-IND database. The contractor is expected to:

- regularly treat the files received by DG ECFIN and upload them in the Eurostat reference database,
- maintain and improve a FAME database for the storage of public and non-public information of business and consumer surveys such as balances, percentage of answers to different modalities of the questions, etc.,
- maintain and improve automated macros to ensure the regular updating of business and consumers surveys data into the Eurostat reference database.

(Additional related documents are available here. https://circabc.europa.eu/w/browse/80d80a6d-d134-45d7-8624-303c739ee225)

The contractor will produce each year of the contract the following deliverables for Task 3, where T is the date of the signature of the contract:

- D8 monthly delivery of updates for business and consumer surveys into the reference database,
- D9 annual report on possible improvements of the updating procedures and the data storage system at T + 12

Task 4- Drafting of an annual basis of four 'Statistical working papers' on PEEIs

The working papers will be in statistical fields like seasonal adjustment, temporal disaggregation, revision analysis, business cycle analysis, nowcasting, construction of composite indicators, etc. The papers are intended to disseminate recent methodological and empirical results obtained in the context of PEEIs activities and to be published in the Eurostat collection "Statistical working papers". The average length of one working paper is expected to be around 20-25 pages. For each of the four working papers the contractor is expected to:

- agree with Eurostat, at the beginning of each year, on the content and coverage,
- collect from Eurostat any input and/or already available material related to the agreed papers,
- provide a draft table of contents and extended abstracts,
- deliver a draft version of the papers to Eurostat for comments and improvements/suggestions,
- incorporate comments and suggestions in the revised version of the papers,
- submit a clean version of the paper to be submitted to Eurostat peer review,
- improve the paper according to the comments from the Eurostat peer review,
- deliver the final version of the papers including bibliography, keyword etc. and respecting the Eurostat guidelines,
- prepare a slide show presentation.

The contractor will produce each year of the contract the following deliverables for Task 4, where T is the date of the signature of the contract:

- D10 draft table of contents and extended abstract of papers at T + 2,
- D11 draft version of the papers at T + 6,
- D12 a version incorporating comments and suggestions at T + 9,
- D13 final version of papers including bibliography keywords etc. at T +12 and respecting the Eurostat guidelines,
- D14 a slide show presentation at T + 12.

Task 5- Regular updates of data, tables and graphs concerning PEEIs-based indicators

The aim of this task is the regular update of data, tables and graphs concerning PEEIs based indicators to be used in section 1 of Eurostatistics, in SE articles, as well as in other online applications such as the revised business cycle clock. The contractor will be expected to:

The contractor will agree with Eurostat during the kick-off meeting at the beginning of each year a delivery calendar for each of the following groups of indicators:

- update on a monthly basis data, tables and graphs for existing leading indicators compiled by other institutions and freely available (around 15 series) (https://circabc.europa.eu/w/browse/80d80a6d-d134-45d7-8624-303c739ee225),
- update on a monthly basis data, tables and graphs related to trend-cycle decomposition and cyclical situation of EA and MSs (12 series for trend-cycle decomposition for EA and EU27 and 30 series for three cyclical indicators and 10

countries) (https://circabc.europa.eu/w/browse/80d80a6d-d134-45d7-8624-303c739ee225),

- update on a quarterly basis data, tables and graphs on historical dating (around 36 series for three cyclical dating and 12 countries) (https://circabc.europa.eu/w/browse/80d80a6d-d134-45d7-8624-303c739ee225),
- update on a monthly basis monthly indicators of economic activities and nowcasting of quarterly GDP (2 indicators for the economic activity of EA – one with surveys and one without - and 21 indicators for nowcasting – three GDP nowcastings at T-30; T+0 and T+30 for seven countries) (https://circabc.europa.eu/w/browse/80d80a6d-d134-45d7-8624-303c739ee225)
- update on a half-yearly basis tables and graphs on back-calculated time series for PEEIs (around 27 quarterly series and 14 monthly series) (https://circabc.europa.eu/w/browse/80d80a6d-d134-45d7-8624-303c739ee225),
- regular update of indicators' data vintages into the EPC part of the historical database under MDT.

The contractor will produce the following deliverables for each year of the contract for Task 5, where T is the date of the signature of the contract:

- D15 a delivery calendar for all the indicators at T+15 days,
- D16 monthly data files tables and graphs according to the schedule on existing freely available leading indicators of the EA,
- D17 monthly data files and tables and graphs according to the schedule on trend cycle decompositions and cyclical indicators,
- D18 quarterly datafiles tables and graphs on historical dating at the end of each quarter according to the schedule,
- D 19 monthly datafiles tables and graphs on economic activity indicators and nowcasting according to the schedule,
- D20 half yearly datafiles tables and graphs on long time series accompanied by an archive of nationally available long time series at the end of each half year according to the schedule.
- D21 annual report on the regular update of indicators' vintages into the EPC database.

Task 6- Regular production of the monthly Eurostatistics publication

Eurostatistics is a monthly publication produced by Eurostat concerning infra-annual statistics. It has been recently revised in order to improve its content and look. The contractor is expected to:

- ensure the monthly production of Eurostatistics within the calendar defined by Eurostat, following Eurostat standards for publication,
- regularly review and update the methodological part of the publication,
- produce in cooperation with Eurostat all the textual part of the publication,
- monthly update and improve meta information included in the Eurostatistics publication,
- monthly update of the Statistics Explained article(s) related to the Eurostatistics publication (including update of the graphs and tables),

- propose improvements of the Eurostatistics publication in terms of content, analysis and layout,
- propose improvements of the Statistics Explained article(s) related to the Eurostatistics publication,
- implement the improvements agreed with Eurostat.

The contractor will produce each year of the contract the following deliverables for Task 6, where T is the date of the signature of the contract:

- D22 monthly release of Eurostatistics ready for publication on the Eurostat website according to the release calendar produced by Eurostat,
- D23 monthly production of Statistics Explained articles related to the Eurostatistics publication
- D24 annual report on possible improvement of the publication at T + 12.

Task 7- Construction of a daily economic indicator

This task is structured in four subtasks where Task 1 contains the methodological developments over the three years while tasks 2, 3 and 4 are describing the expected production activities.

Subtask 7.1 - Selection and simulation of a method for the construction of a daily economic indicator

In the first year the contractor is expected to evaluate and rank alternative mixed frequency methods and compare the best ranked one with the classical conference board approach. The methods to be evaluated are:

- Midas
- Mixed-frequency VARS
- Unobserved component models

The best performing method is to be then used in a large simulation exercise with data for the Euro area and the largest EA economies – Germany, France and Italy. The simulation should be done in Matlab, Gauss or Ox metrics.

In the second year the contractor is expected to:

- investigate the usefulness in respect to enhancing the daily economic indicator of constructing daily sectorial indices including ones related to the commodity, asset and housing markets and financial markets;
- evaluate the performance of the new daily indicator including with sectorial daily indices with respect to the original version within a real-time exercise.

In the third year the contractor is expected to:

- investigate the possibility of disseminating the sectorial component of the daily indicator based on their observed performance within a real time simulation exercise;
- investigating the usefulness of constructing daily turning points indicators to be included in the PEEIs daily indicators;
- develop a strategy for the internalisation of the production of all daily indicators.

The contractor will produce the following deliverables for Subtask 7.1, where T is the date of the signature of the contract:

For year 1:

- D25 a technical report for the selection of the best performing method at T + 2;
- D 26 a technical report for the simulation exercise at T + 5.

For year 2:

- D27 a technical report on the construction of sectorial indicators T + 6;
- D28 a technical report on the implementation and automation of the daily sectorial indicators at T + 6;
- D29 a technical report on the final specification of the sectorial indicators T + 12;
- D30 a technical report on the real-time simulation of the sectorial indicators T + 12;
- D31 a technical report on the enhancement of the daily economic indicator due to the inclusion of sectorial indicators T + 12.

For year 3

- D32 a technical report on opportunity of disseminating T + 3;
- D33 a technical report on the turning points T + 12;
- D34 a technical report on the internationalisation strategy for the daily indicators at T + 12.

Subtask 7.2- Construction and implementation of a daily indicator based on PEEIs for the EA and largest economies and its automation

This subtask is only relevant for the first year. The aim of the subtask is to develop a fully operational statistical procedure for the construction of a daily indicator for the EA and its largest Member States – Italy, France, Germany, Spain, Belgium, The Netherlands and the United Kingdom and to develop a fully automated production tool compatible with the Eurostat architecture possibly running within Jdemetra+. The contractor shall ensure, according with the timing proposed by Eurostat, the daily production of the daily economic indicator.

The contractor will produce the following deliverables for Subtask 7.2, where T is the date of the signature of the contract:

- D35 a technical report on the statistical methodology for the regular production of the daily indicator at T + 7;
- D36 technical report for a test production of the daily indicator for the EA; Italy, France, Germany, Spain, Belgium, The Netherlands and the United Kingdom T + 7;
- D37 from T + 8 daily delivery of the daily economic indicator ready for web and mobile devises dissemination;
- D38 automated procedure for the indicators at T + 8;
- D39 A technical assessment of the implementation and production of the daily indicator at T + 12.

Subtask 7.3 - Construction and implementation of a daily indicator based on PEEIs for the remaining EA countries – Portugal , Luxembourg, Finland, Slovakia, Slovenia, Ireland, Cyprus, Malta, Estonia, Austria, Greece

This subtask is only relevant for the second year. The aim of the subtask is to develop the production of the indicator also for the rest of the EA and to ensure its regular running and the automated procedure developed in subtask 7.2. In addition a review of the indicators already developed should be performed and improvements should be suggested. Further the contractor should ensure the regular production of the daily economic indicator from t+0 and of the sectorial indicators from month t+8 and of the enhanced daily economic indicator (the daily economic indicator enhanced with the inclusion of the sectorial indicators) from month t+8.

The contractor will produce the following deliverables for Subtask 7.3, where T is the date of the signature of the contract:

- D40 regular delivery of the daily economic indicator – every day starting T+0;
- D41 Regular delivery of the sectorial daily indicators – every day starting T+8;
- D42 regular delivery of the enhanced economic indicator – every day starting T+8;
- D43 a technical report on the statistical methodology for the regular production of the daily indicator - T+9;
- D44 a technical report for a test production of the daily indicator for the other EA countries T+11;
- D45 a report on the inclusion of additional countries in the automated procedure at T + 12;
- D46 a technical report of improvements of the daily indicators at T + 12.

Subtask 7.4 - Construction of a daily indicator based on PEEIs for remaining EU countries plus EU 27

This subtask is only relevant for the third year. The aim of the subtask is to develop the production of the indicator for the rest of the EU countries. In addition a review should be performed of the indicators already developed and improvements should be suggested. Further the contractor should ensure the regular production of the daily economic indicator from t+0, the sectorial indicators and of the enhanced daily economic indicator throughout the year.

The contractor will produce the following deliverables for subtask 7.4, where T is the date of the signature of the contract:

- D47 regular delivery of the daily economic indicator – every day starting T+0;
- D48 regular delivery of the sectorial daily indicators – every day starting T+0;
- D49 regular delivery of the enhanced economic indicator – every day starting T+0;
- D50 a technical report on the statistical methodology for the regular production of the daily indicator - T+9;
- D51 a technical report for a test production of the daily indicator for the other EU countries plus EU27 - T+11;
- D52 a report on the inclusion of additional countries in the automated procedure at T + 12;
- D53 a technical report of improvements of the daily indicators at T + 12**.**

  (Additional related documents are available here https://circabc.europa.eu/w/browse/80d80a6d-d134-45d7-8624-303c739ee225)

Task 8- Designing and regular updating of an interactive and friendly tool for cyclical monitoring to complement and progressively replace the existing business cycle clock

This task is only relevant for first year. The aim of the task is to provide a prototype and technical and functional specifications. The contractor is expected to:

- analyse features and characteristics of the business cycle clock with a critical evaluation,
- propose an alternative specification of the tool based on existing cyclical indicators and dating produced under task 5,
- design a new and friendly tool also targeted to mobile dissemination with high degree of interactivity and define its statistical and dissemination main characteristics,
- develop of a prototype version of the tool for testing and comments by Eurostat,
- produce functional and technical specifications to allow the implementation of the tool within the Eurostat IT architecture.

  (The business cycle clock is available here - http://epp.eurostat.ec.europa.eu/cache/BCC2/group1/xdis_en.html)

The contractor will produce the following deliverables for Task 8, where T is the date of the signature of the contract:

- D54 a technical report on the features and characteristics of the new business cycle clock T+2,
- D55 a technical report on the alternative specification at T+3,
- D56 a technical report on the new friendly and interactive tools exploitable on mobile devices at T+6,
- D57 a prototype version – T+9,
- D58 a technical and functional specification – T+12.

2.4 Meetings and missions

Each year, a kick-off meeting with duration of one day will be organised in Luxembourg on Eurostat premises soon after the signature of the contract.

Quarterly progress meetings (maximum duration half day) with Commission staff will be held in Luxembourg, in Commission's premises. For these meetings the contractor will prepare progress reports to be sent to Eurostat at least three days prior to the meetings. The minutes of each meeting will be prepared by the contractor and sent to Eurostat at the latest 7 days after the meeting for approval.

Travel expenses for such meetings should be included in the financial proposal of the tender.

In addition to the progress meetings, frequent contacts will be required to work on the content of each task. These contacts can be made via telephone or e-mails.

2.5 Duration and timetable

The contract is expected to be signed in the 4th quarter of 2013.

Execution of the tasks is to start on 15.12.2013. or the date of the signature of the contract, whichever occurs last The overall duration of the work will be 36 months, divided into 3 contracts covering work periods of 12 months each. Implementation of each contract, whether total or partial, following the initial contract, is subject to budgetary constraints and/or satisfaction with the quality of the services rendered under the previous contract and/or unilateral discretionary decision of the Commission. The tenderer awarded the contract must carry out the contracts following the initial contract where requested by the Commission to sign the contract in question.

The overall indicative timetable is the following:

YEAR 1

Deliverables	M 1	M 2	M 3	M 4	M 5	M 6	M 7	M 8	M 9	M 10	M 11	M 12
Task 1												
D1	X	X	X	X	X	X	X	X	X	X	X	X
D2	X	X	X	X	X	X	X	X	X	X	X	X
D3			X			X			X			X
D4												X
Task 2												
D5	X											
D6			X			X			X			X
D7												X
Task 3												
D8	X	X	X	X	X	X	X	X	X	X	X	X
D9												X
Task 4												
D10		X										
D11						X						
D12									X			
D13												X
D14												X
Task 5												
D15	X											
D16	X	X	X	X	X	X	X	X	X	X	X	X
D17	X	X	X	X	X	X	X	X	X	X	X	X
D18			X			X			X			X
D19	X	X	X	X	X	X	X	X	X	X	X	X
D20						X						
D21												X
Task 6												
D22	X	X	X	X	X	X	X	X	X	X	X	X
D23	X	X	X	X	X	X	X	X	X	X	X	X
D24												X
Task 7												
Subtask 7.1												
D25		X										
D26					X							
D27												

D28												
D29												
D30												
D31												
D32												
D33												
D34												
Subtask 7.2												
D35												
D36												
D37												
D38												
D39												
Subtask 7.3												
D40												
D41												
D42												
D43												
D44												
D45												
D46												
Subtask 7.4 -												
D47												
D48												
D49												
D50												
D51												
D52												
D53												
Task 8												
D54												
D55												
D56												
D57												
D58												

YEAR 2

Deliverables	M 1	M 2	M 3	M 4	M 5	M 6	M 7	M 8	M 9	M 10	M 11	M 12
Task 1												
D1												
D2												
D3												
D4												
Task 2												
D5												
D6												
D7												
Task 3												
D8												
D9												
Task 4												
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Task 6												
D22												
D23												
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Task 7												
Subtask 7.1												
D25												
D26												
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Subtask 7.2												
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Subtask 7.3												
D40												
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D42												
D43												
D44												
D45												
D46												
Subtask 7.4 -												
D47												
D48												
D49												
D50												
D51												
D52												
D53												
Task 8												
D54												
D55												
D56												
D57												
D58												

YEAR 3

Deliverables	M 1	M 2	M 3	M 4	M 5	M 6	M 7	M 8	M 9	M 10	M 11	M 12
Task 1												
D1												
D2												
D3												
D4												
Task 2												
D5												
D6												
D7												
Task 3												
D8												
D9												
Task 4												
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Task 7												
Subtask 7.1												
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Subtask 7.2												
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Subtask 7.4 -												
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D51												
D52												
D53												
Task 8												
D54												
D55												
D56												
D57												
D58												

Legend:

- M – month of project lifetime
- x – task's lifetime
- St - subtask

A detailed timetable should be provided by the tenderer in the offer.

2.6 Reports

The work carried out by the contractor under the contract will be the subject of the following reports, which must be sent to Eurostat by the contractor both in hard copy and electronic format.

- Six months after the starting date of the execution of the tasks referred to in Article 1.2.3 of the contract, the contractor shall provide, in view of the progress of completion of the tasks referred to in 2.3 and as soon as possible after this date, an interim technical report relating to the execution of the contract describing the results obtained and the means which were implemented for the execution of the contract.

- Twelve months after the starting date of the execution of the tasks referred to in Article 1.2.3 of the contract, the contractor shall provide, as soon as possible and within sixty days of completion of the tasks referred to in 2.3, a final technical report relating to the execution of the contract describing the results obtained and the means which were implemented for the execution of the contract.

All reporting should be done in English.

These reports shall accompany the corresponding invoice.

2.7 Assessment of results

Evaluation of the results will be based on the quality of the required outputs with particular attention to:

- the clarity of presentation of the reports,
- the proposed methodologies and solutions,
- the respect of deadlines,
- the quality and level of detail of the products required.

2.8 Specific conditions

- Specific requirements to bid for this lot (specific selection criteria)

In addition to the general selection criteria described in section 4 of the tender specifications, the following capacities will be required to execute the tasks:

- At least four person with a graduate university degree in economics and/or statistics or a related field and 3 years of experience in time series, multivariate statistical methods, estimation techniques. In case no diploma is available, 6 years of experience in the mentioned fields are required.
- Mobilisation – at least five persons - of high level scientific expertise in time series, multivariate statistical methods, estimation techniques. 5 years of experience in a university or a research institute in the above mentioned fields are required.
- For the software implementation part at least one person with 3 years of experience with Matlab, Gauss or Ox metrics.
- For the software implementation part at least one person with 3 years of experience in Java and preferably NetBeans.

- Specific conditions for the execution of the contract

Availability of Matlab, Gauss or Ox metrics. Availability of Latex or a related product like Scientific WorkPlace for Task 4.

Language environment

The main working language will be English.

The documents will be written in English.

Informatics environment

The current informatics production environment is centred around MDT database, Matlab, Gauss or Ox metrics.

The informatics environment is subject to development.

General layout rules

All publications have to follow the rule of the Eurostat style guide and of the Interinstitutional style guide.

The Interinstitutional style guide is a reference tool for all written works published by European institutions. It establishes conventions and common practices to be followed in order to present a consistent identity of the European Union institutions for citizens. The Interinstitutional style guide is published in all official languages of the EU. It takes into account that while the specific character of each language has to be kept, texts in all official languages have to be comparable.

The Eurostat publications graphical style guide is a complement of the Interinstitutional style guide and describes visual rules and conventions for Eurostat publications.

For Statistics Explained and Statistics in Focus, the guidelines can be found on http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Tutorial:Contents .

The contractor may participate free of charge at Eurostat training courses on Statistics Explained and on Statistics in Focus, in the premises of Eurostat in Luxemburg.

The layout of the working documents should be prepared in line with Eurostat guidelines for publications, in particular concerning the collection "Statistical working papers" (see http://publications.europa.eu/code for the rules of the Interinstitutional Style Guide, and refer to the Eurostat Style Guide at http://epp.eurostat.ec.europa.eu/portal/page/portal/publications/publications_guidelines for the layout of pages, tables and graphs).

All publications should be provided in English in professional native speaker language quality and the contractor is expected to provide publication-ready documents in electronic format.

The production of publications will usually involve several rounds of draft versions produced by the contractor and related comments from Eurostat. The contractor shall implement all comments until Eurostat approves the final version.

2.9 Award criteria for the assessment of the bids

The technical quality of the bid will be assessed on the basis of the following criteria (see also section 4 item 4.5.2 of the tender specifications on how the contract will be awarded):

1. Comprehension (30 *points*)

Does the tenderer's interpretation of the terms of reference demonstrate that he has:

- understood the main aspects, scope of the project, the volume of work involved, and above all the objectives and expected results?

- covered all of the essential points?

2. Technical approach and methodology (50 *points*)

Does the practical implementation proposed for the project demonstrate efficiency and effectiveness of approach and method taking into account any particularities that are mentioned in the specific project/lot?

Level of detail of description of the work and the clarity of practical application on how to achieve the project's goals and outputs, if possible with examples to demonstrate that it will work.

Presentation of the expected results; description of tangible results to be attained.

3. Work plan and timetable (10 *points*)

Are the work plan and the timetable detailed enough to demonstrate that the method is feasible by the proposed deadline?

Does the work plan make specific reference to mobilisation of the experts/team, appropriate evaluation points, submission of reports and documents, specific meetings etc.?

Does the tender show agreement that implementation of the work programme is feasible, including rapid start-up and reports submitted on time?

4. Management arrangements (5 *points*)

Organisation of work – covering both implementation of the contract and also how the Contractor will provide support for the management and administration of the contract.

A description of how autonomously the tenderer is able to implement the project, an estimate of how much and what kind of Eurostat involvement would be needed to ensure successful delivery and how cooperation with the Commission will be managed in practice.

Staffing arrangements – Appropriate resources proposed for achieving the desired objectives. Description of how each of the proposed experts will be assigned to the various elements of the work. Description of the control the tenderer will exercise over those working on the project. This should include an indication of how the tenderer will assure continuity if those assigned to the project leave.

5. Quality arrangements (5 *points*)

Proposed approach to ensure that the service provided/work delivered to Eurostat will be of acceptable quality.

SECTION 3 INFORMATION ON THE CONTRACT

3.1 General information

The submission of a tender in response to an invitation to tender issued by the Commission implies that the tenderer:

– accepts all the conditions laid down in the invitation to tender and the contract (in annex 10);

– waives his or her own conditions of sale/service, terms of business or other general terms and conditions;

– confirms that there has been no collusion with other contractors in bidding for the work and there has been no canvassing or soliciting of Eurostat staff.

All documents submitted by tenderers become the property of the Commission and are deemed confidential.

The Contractor is to carry out the tasks in accordance with:

1. the contract;
2. the technical specifications;
3. the tender.

In the event of conflict between these three documents, their provisions will apply in descending order.

Once the Commission has opened the tender, the document shall become the property of the Commission and it shall be treated confidentially.

Variants are not allowed.

The place of the work will be the Contractor’s usual workplace, unless stated otherwise in section 2.

3.2 Payments

Contracts will be expressed in euro. All payments under these contracts will also be made in euro.

Payments under the contract will be made in accordance with Articles I.4 and II.15 of the draft contract in Annex 10.

3.3 Replacement of persons assigned to carry out the work

The Commission expects the contract to be executed by those persons identified in the tender. Whenever a replacement is necessary, the Contractor must ensure a high degree of stability of the services and an effective transfer of information.

Any replacement must be submitted to the Commission for written approval. The Contractor shall provide a timely replacement with at least equivalent qualifications and experience if:

– for duly justified reasons, a person is unable to continue providing his services;

– any person specified in the contract is found by the Commission to be incompetent in discharging or unsuitable for the performance of his duties under the contract or if carrying out his tasks under the contract prejudices the good and timely performance of the contract. Unless otherwise stated, if the Commission requests a replacement in writing, the Contractor must propose a replacement within one month of the receipt of the Commission's request. Failure to make such a proposal within this period will be considered a breach of contract.

Such a replacement will not oblige the Commission to pay any remuneration, fees or costs additional to those laid down in the initial contract. The Contractor must bear any additional costs arising from or incidental to such replacement. Such costs will include the costs of the return journey of the replaced member of staff and his family, the costs of the replacement's training and, if necessary, the expenses arising from the need to maintain simultaneously at the place of work the member of staff to be replaced and his replacement.

3.4 Personal data and intellectual property rights

3.4.1 Personal data

If processing your reply to the invitation to tender involves 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 unit involved. Details concerning the processing of your personal data are available at:

http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf

Your personal data (name, given name if natural person, address, legal form, registration number and name and given name of the persons with powers of representation, decision making or control, if legal person) may be registered in the Early Warning System (EWS) only or both in the EWS and Central Exclusion Database (CED) by the Accounting Officer of the Commission, should you be in one of the situations mentioned in the Commission Decision 2008/969/EC, Euratom of 16 December.2008 on the Early Warning System (for more information see http://ec.europa.eu/budget/info_contract/legal_entities_en.htm) or the Commission Regulation (EC, EURATOM) N° 1301/2008 of 17 December 2008 on the Central Exclusion Database.

3.4.2 Intellectual property rights

Your attention is drawn on Article I.8 of the contract's special conditions which contains specific provisions on intellectual property rights related to the results of the contract and their use.

SECTION 4 INFORMATION ON THE TENDER PROCEDURE

4.1 General information

This invitation to tender is published in the Official Journal (OJ) in accordance with the "Financial Regulation": REGULATION (EU, EURATOM) No 966/2012 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1605/2002[1].

This invitation to tender is intended to be competitive. Any attempt by a tenderer to obtain confidential information, enter into unlawful agreements, collude or make arrangements with competitors, canvass or solicit Commission staff or influence the evaluation committee or its individual members in any way during the tendering process will render his or her tender invalid.

The tender must be clear and concise, with continuous page numbering, and assembled so as to constitute a coherent whole (e.g. bound or stapled, etc.). Since tenderers will be judged on the content of their written offers, these must clearly state that the tenderer is able to meet the requirements of the specifications and is capable of carrying out the work.

Tenders must be written in one of the official languages of the European Union. They must include all the information and documents required by the Commission for the appraisal of tenders on the basis of the exclusion, selection and award criteria, in accordance with these specifications, in the absence of which the Commission may decide to exclude the tender from the award procedure for the contract. For details, see item 4.4 “Structure of the tender”.

4.2 Who may participate in this invitation to tender

Participation in this invitation to tender (including each member of a consortium if applicable) is open on equal terms to all natural and legal persons coming within the scope of the Treaties and to all natural and legal persons who are nationals of countries which:

- have a special agreement with the European Union in the field of public procurement under the conditions laid down in that agreement or,

- have ratified the Plurilateral Agreement on Government Procurement (GPA) concluded within the WTO, under the terms of that Agreement.

A service provider may consider submitting a tender as a single entity or decide to collaborate with other service providers to present a bid: either by submitting a joint tender (via a consortium) or through subcontracting. These two approaches may be combined.

In all cases the tender must clearly specify whether the providers involved in the tender are acting as members of the consortium (joint tender) or as subcontractors (this also applies where the companies involved belong to the same group or where one of these companies is the parent company of the others).

A joint tender is a situation where an offer is submitted by a group of tenderers (consortium). If awarded the contract, each member of the consortium will be jointly and severally liable towards the Commission for the performance of the contract.

Consortia members in joint tenders may submit <u>only one tender</u> for a single contract. The tender must indicate which member will represent the consortium in dealing with the

[1] OJ L298 of 26.10.2012

contracting authority. The tender must describe the form the cooperation is to take in order to achieve the desired results and how technical, administrative and financial aspects will be organised.

If the tender does not mention that all members are jointly and severally liable, all other parties included in the tender than the party signing the tender (tenderer) will be considered subcontractors.

Subcontracting is the situation where a contract has been or is to be concluded between the Commission and a contractor and where the contractor, in order to carry out the contract, enters into legal commitments with other legal or natural persons for performing part of the service (in particular, any work performed by an expert who is not an employee of the tenderer will be considered as subcontracted). The Commission has no direct legal relationship with the subcontractor(s).

If certain tasks provided for in the contract are entrusted to subcontractors, the Contractor shall remain bound by his obligations to the Commission under the Contract and shall bear exclusive liability for proper performance of the Contract. (see Article II. 7 of the draft contract in Annex 10).

During implementation of the contract the Contractor must obtain prior written approval from the Commission in order to replace a subcontractor and/or have work which was not originally subcontracted in the original tender carried out by third parties.

See Section 4, item 4.4 which information must be provided in case of consortium and subcontracting.

4.3 How to send a tender

4.3.1 General Information

If you are interested in this contract, you should submit one original and four copies of your tender (see structure below) on paper (for each lot concerned, if several lots are proposed).

You must indicate on the parcel the title of the call for tender, the reference number, the lot number (if any) and the name of the tenderer. It should also bear the words "Invitation to tender – not to be opened by the mail service". If a self-adhesive envelope is used as parcel, it must be sealed with adhesive tape and the sender must sign across this tape.

The tender must meet the deadline mentioned in the contract notice and be submitted:

- either **by registered mail or by courier service**, postmarked or registered by the courier service not later than.**10/09/2013.**, to the following address:

European Commission
Eurostat - Unit A.5 - (CAD) BECH F2/907
Jean Monnet Building
Rue Alcide de Gasperi
L-2920 Luxembourg (Kirchberg)

The outer envelope should bear, in addition to this address, the project title and the reference number of the invitation to tender.

- or **by hand delivery**, i.e. by delivery in person or by an authorised representative, not later than **4.00 p.m.** on **10/09/2013** to the following address:

European Commission
Eurostat - Unit A.5 – (CAD) BECH F2/907
Jean Monnet Building – Main entrance
Rue Albert Wehrer
L-2920 Luxembourg (Kirchberg)

where a signed and dated receipt must be obtained from an official in the Commission's central mail department who takes delivery. This department is open from 08:30 to 17:30 Monday to Thursday, and from 08:30 to 16:30 on Friday. It is closed on Saturday, Sunday and Commission holidays.

If the bid is delivered by hand in person, it must actually reach the address indicated above no later than the hour and day indicated. See the summary table below:

	Final date	**Proof concerning**	
		submission of tender	**compliance with deadline**
Registered letter deposited in the post office network	The tender must be **posted** on the final date at the latest (regardless of the time)	Receipt issued by the post office	Postmark
Mail deposited with a messenger service	The tender must be **deposited** with the messenger service on the indicated date at the latest (regardless of the time)	Receipt issued by the messenger service	Date of the receipt
Delivery by hand, by the tenderer or by an authorised representative	The tender must arrive at the above-mentioned office address no later than the specified time on the final date.	Receipt signed by an official of the above-mentioned Commission service, indicating the date and time of receipt. This receipt will be issued on the spot to the tenderer or authorised representative.	Date of the receipt

The Commission will not reimburse expenses incurred in preparing and submitting tenders.

4.3.2 Date and place of opening of the tenders

Tenders will be opened on **20/09/2013 at 10 a.m.** at the following address:

Eurostat
Room B4/444
Joseph Bech Building
rue Alphonse Weicker, 5
L-2721 Luxembourg (Kirchberg)

One authorised representative of each tenderer may be present at this opening session. A written authorisation signed by the tenderer or his duly authorised agent must be presented to the chairman of the opening committee.

4.3.3 Contact with Eurostat

In principle, no contact is permitted between the Commission and the tenderer during the procedure. However, contact may exceptionally be permitted before the final date for the receipt of bids:

- On the tenderers' initiative in order (and only then) to clarify the nature of the contract. Such requests for additional information should be in writing only and indicate the section(s) and paragraph(s) to which they refer. They may be sent by letter, fax or e-mail only to the address given below. Provided it has been requested in good time, such additional information will be supplied simultaneously to all economic operators on the Internet address https://etendering.ted.europa.eu/cft/cft-display.html?cftId=331 no later than six days before the deadline for the receipt of tenders or, in the case of requests for information received less than eight calendar days before the deadline for receipt of tenders, as soon as possible after receipt of the request. The contracting authority is not bound to reply to requests for additional information made less than five working days before the deadline for receipt of tenders.
- On the initiative of the contracting authority, in order to inform all interested parties of the existence of an error, a lack of precision, an omission or any other type of defect in the documents relating to the invitation to tender by supplying information on the Internet address https://etendering.ted.europa.eu/cft/cft-display.html?cftId=331

After the tenders have been opened, contact may be permitted only on the initiative of the contracting authority, where some clarification is required in connection with a tender, or if obvious clerical errors in the tender must be corrected.

In any event, such contact must not lead to any amendment of the terms of the tender.

Under the conditions described above, further information can be obtained by sending a **letter, fax or e-mail** to:

ESTAT FINANCIAL CELL DIR C-D
Eurostat
Office BECH E4/817
Jean Monnet Building
Rue Alcide de Gasperi
L-2920 Luxembourg (Kirchberg)
E-mail ESTAT-FINANCIAL-CELL-DIR-C-D@ec.europa.eu

4.3.4 Period of validity of the tender

Tenders must be firm and not be subject to revision for the duration of the work. The tender must remain valid for a period of **12 months** following the closing date for receipt of the tenders as indicated under point IV.3.4 of the contract notice. Where the initial contract is stated to be renewable, the offer will remain valid for such renewals. Upon renewals of contracts, the Commission reserves the right to request updated forms for exclusion and selection criteria (see item 4.4 below). The contract(s) will be signed within the validity period, during which the tenderer must continue to meet all the requirements set in the exclusion, selection and award criteria. If the situation concerning these requirements has altered in the period that has elapsed since the tender in question was submitted, any changes must be reported immediately and at the bidder's own initiative to the Commission.

4.4 Structure of the tender

Tenders must be presented in the following five sections including all the requested information (in the absence of which the Commission may decide to exclude the tender from the award procedure for the contract) and perfectly legible so that there can be no doubt as to words and figures:

- *Section One: Administrative information*
- *Section Two: Exclusion criteria*

– *Section Three: Selection criteria*

– *Section Four: Technical bid*

– *Section Five: Financial bid*

The Commission reserves the right to request any other additional information in relation to the tender submitted, for evaluation or verification purposes within a time-limit mentioned in its request.

4.4.1 Section One: Administrative information

In the first section, the tenderer must provide:

- A cover letter duly signed by the legal representative of the tenderer

- A table of contents (with page numbers)

- Administrative documents concerning its legal situation, i.e.:

Case 1: Submission by one tenderer

– The completed "Administrative information form" as provided in Annex 1;

– The "Legal entity form" (Annex 2) completed and signed by an authorised representative of the tenderer, accompanied by all the requested supporting evidence. A standard form for individuals, private entities and public entities in each Member State language is available at the following Internet address:

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

– The "Financial identification form" (Annex 3) filled in and signed by an authorised representative of the tenderer and his bank. A specific form for each Member State is available at:
  http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm

– The questionnaire for joint bids and/or subcontracting signed by a legal representative of the tenderer (lead partner in case of joint bid with subcontracting) (Annex 4)

Case 2: Submission in case of the tenderer with subcontractor(s)

If the tenderer wishes to subcontract all or part of the services, in addition to the documents to be provided in case 1, the following information must be provided in the tender:

– The "Legal entity form" (Annex 2) completed and signed by the authorised representative of each subcontractor, accompanied by all the requested supporting evidence. A standard form for individuals, private entities and public entities in each Member State language is available at the following Internet address:

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

– A letter of availability from the subcontractor that he intends to work together with the tenderer if the tenderer is awarded the contract (Annex 5) ;

Case 3: Submission of joint tender

Each entity involved (all members of the consortium included the lead partner) must provide following documents:

- The completed "Administrative information form" as provided in Annex 1;
- The "Legal entity form" (Annex 2) completed and signed by an authorised representative of the tenderer, accompanied by all the requested supporting evidence. A standard form for individuals, private entities and public entities in each Member State language is available at the following Internet address:

  http://ec.europa.eu/budget/info_contract/legal_entities_en.htm
- A letter signed by each member of the consortium, except the lead partner, giving the authorisation to the lead partner to submit the tender on its behalf.

In addition, the following documents must be provided by the lead partner:

- The "Financial identification form" (Annex 3) filled in and signed by an authorised representative of the tenderer and his bank. A specific form for each Member State is available at: http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm
- The questionnaire for joint bids and/or subcontracting signed by a legal representative of the lead partner. (Annex 4)

The following document must be provided by the lead partner only before the signature of the contract and on the request of the Commission:

- "Power of attorney" filled in and signed by an authorised representative of each partner (Annex 6)

4.4.2 Section Two: Exclusion criteria

The tenderer(s) including each partner in case of joint tender and each subcontractor must provide the "Declaration on grounds for exclusion" (Annex 7).

Tenderers will be excluded from participation in the procedure of the call for tenders where:

(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 contracting authority can justify;

(d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;

(e) they have been the subject of a judgment which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the European Union' financial interests;

(f) they are currently subject to an administrative penalty following the cases where:

- they have been guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or fail to supply this information.

- they have been declared to be in serious breach of their obligations under contracts covered by the European Union budget.

Contracts may not be awarded to tenderers who, during the procurement procedure:

(g) are subject to a conflict of interest.

(h) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or fail to supply this information.

(i) find themselves in one of the situations of exclusion referred to points (a) to (f) above.

Only on request, and for contracts of a value higher than EUR 130°000, the tenderer(s) (all partners in case of joint tender) to whom the contract is to be awarded shall have to provide evidence that they are not in any of the situations listed above.

The contracting authority will accept, as satisfactory evidence:

– for situations referred to in (a), (b) or (e), a recent extract (dated no earlier than 4 months before the deadline for submission of tenders) from the judicial/criminal records or, failing this, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance attesting that these requirements are satisfied;

– for the situation referred to in (d), a recent certificate or letter (dated no earlier than 4 months before the deadline for submission of tenders) issued by the competent authority of the State concerned. These documents must provide evidence of payment of all taxes and social security contributions for which the tenderer is liable, including VAT, income tax (natural persons only), company tax (legal persons only).

Where the Tenderer is a legal person and the national legislation of the country in which the Tenderer is established does not allow the provision of such documents for legal persons, the documents should be provided for natural persons, such as the company directors or any person with powers of representation, decision making or control in relation to the Tenderer.

For any of the situations referred to in (a), (b), (d) or (e), where any document described in the two paragraphs above is not issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement (the form in Annex 7 may be used for this purpose) made by the interested party in front of a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

- for situations referred to in (c), (f), (g) and (h) the form in Annex 7 duly signed and dated by the interested party.

The contracting authority may impose administrative and financial penalties on tenderers to whom one of the grounds for exclusion listed above applies, in accordance with the Financial Regulation.

4.4.3 Section Three: Selection criteria

a- Economic and financial capacity:

Tenderer(s), in case of joint tender each partner, must

– fill in the compulsory reply form for accounting data (Annex 8)

– enclose the full set of annual accounts (balance sheet, profit and loss account and notes on the accounts) for the last two years.

If these documents are unavailable for a valid reason properly justified in the tender, the tenderer may prove his economic and financial capacity by other means which the Commission considers appropriate.

If these documents have already been provided within the framework of another call for tender published by Eurostat in 2013, you do not have to provide them again.

b-Technical and professional capacity:

The following documents must be provided by the tenderer(s) as an evidence of the educational and professional qualifications:

– Tenderers must enclose a CV of all personnel to be involved directly in performing the contract (including those working for any subcontractors) indicating educational and professional qualifications and experience in areas relevant to the subject of this tender.

– In the CV the language competence must be mentioned, bearing in mind that the main working languages in the Commission are English, French and German.

– Tenderers must indicate whether or not the proposed staff is currently working for the tenderer on the date of submission of the offer. The tender will clearly indicate if the proposed expert is an employee or not of the tenderer. If the proposed expert is not an employee, he/she will be considered as a subcontractor. Any person who is engaged on another project, where the input from his/her position in that contract will not have ended before the expected start of his/her activities under this contract, and where this commitment restricts his/her intended role under this contract must not be proposed for this contract.

– A signed commitment (letter of availability) from all involved persons (including employees and subcontractors) to accept the work proposed by the tenderer if the tenderer is awarded the contract (Annex 5) must be attached.

In addition, the tenderer shall provide a list of the principal services provided in the past three years, with the amounts, dates and recipients (public or private) and any relevant evidence proving the requirements of the specific selection criteria (refer to section 2 item 2.8).

4.4.4 Section Four: Technical bid

The technical bid is the core of the tender and it is essential that it conforms perfectly to all requirements listed in the technical specifications.

If it is intended to subcontract part of the service, this should be indicated and quantified (the identity of and resources provided by the subcontractor).

4.4.5 Section Five: Financial bid

The compulsory reply form (Annex 9) must be used.

– prices must be expressed in euro

– prices should be quoted free of all duties, taxes and other charges, i.e. also **free of VAT**, as the European Commission is exempt from such charges pursuant to the provisions of Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union (of 8 April 1965).

– All costs associated with the completion of the work, including overheads such as infrastructure, administration, costs and travel should be included in the overall fixed price in the financial proposal (no reimbursable variable costs).

4.5 Assessment method and award of the contract

4.5.1 Exclusion and selection of tenderers

The assessment of tenderers will take place in 2 stages:

a- Exclusion of tenderers

The exclusion criteria will be assessed in relation to each tenderer or subcontractor individually.

To be eligible for participating in this tender procedure, tenderers must not be in any of the situations covered by the exclusion criteria (see item 4.4.2)

b- Selection of tenderers

Tenderers will be selected if they have the economic and financial capacity as well as the technical and professional capacity to perform the tasks required in this call for tender.

The economic and financial capacity of tenderer will be assessed on the basis of the last annual turnover and the examination of the following figures or ratios (own funds capital, working capital, gross operating surplus, net result, self-financing capacity, general liquidity, debt, coverage of third-party funds by self-financing capacity, and profitability). Special attention will be paid to the following criteria: own funds, working capital, gross operating surplus, liquidity ratio and debt ratio.

The technical and professional capacity of tenderer(s) will be assessed from the qualifications of the staff/experts proposed, the principal services provided in the past three years and, if any, the specific requirements mentioned in the tender specifications. In the case of joint tender (consortium) or subcontracting, the technical and professional capacity shall be assessed in relation to the combined capacity of all the parties involved in the tender

The assessment will be based on the tender and on tenderers' answers in the compulsory reply forms. Tenderers who wish to be taken into consideration must submit all the necessary supporting documents and must use the forms provided in the annexes to this document.

Incomplete tenders may be rejected. However, the Commission may request the submission of missing formal documents by electronic mail (normally to be submitted within 24 hours of the request).

In addition, the Commission reserves the right to use any other information from public or specialist sources.

4.5.2 Award of the contract

a- Evaluation of the technical quality of the bid

The evaluation (award) criteria will be assessed in relation to the tender as a whole.

The technical bid (including any subcontracted parts) must be sufficiently detailed to enable the bid to be assessed on the basis of <u>all award criteria mentioned under item 2.9 of section 2 of the tender specifications</u>. It should meet the technical specifications and address all matters laid down therein. The tender should provide all the information required to award the contract, including a description of the intended team structure and the respective role of each team member and (where applicable) models, examples and technical solutions to problems raised in the specifications.

Merely repeating the mandatory requirements set out in these specifications without going into detail or adding any value will result in a very low score. The degree to which the criteria are met will be measured by a points score for each criterion. The relative importance of criteria for the overall score is indicated by the weighting of the award criteria.

Before its dispatch, please check that your bid is well documented according to the award criteria.

b- Method of selecting the economically most advantageous tender

Only tenderers whose bid has scored 50 points or more on the technical evaluation according to the criteria and points set out under item 2.9 of section 2 may participate in the evaluation of the financial proposal. The contract will be awarded to the economically most advantageous tender, on the basis of the following method: the price of each bid is divided by the number of technical points awarded to the bid. The bid with the lowest ratio is deemed the economically most advantageous.

c- Notification of tenderers of decisions taken by the contracting authority

The contracting authority will inform all unsuccessful tenderers, simultaneously and individually, as soon as possible after the award decision and within the following week at the latest, by fax or electronic means, that their application or tender has not been accepted, specifying in each case the reasons why the tender or application has not been accepted.

At the same time that it notifies unsuccessful tenderers that they have not been accepted, Eurostat will notify the successful tenderer of the award decision. This notification does not constitute a commitment on the part of Eurostat.

Unsuccessful tenderers may request additional information about the reasons for their rejection in writing by mail, fax or email, and all tenderers who have put in an admissible tender (i.e. one that meets the exclusion and selection criteria) may obtain information about the characteristics and relative merits of the tender accepted and the name of the successful tenderer.

However, certain details need not be disclosed where disclosure would hinder application of the law, would be contrary to the public interest or would harm the legitimate business interests of public or private undertakings or could distort fair competition between those undertakings.

The contracting authority must reply within fifteen calendar days from receipt of the request.

The contracting authority may not sign the contract with the successful tenderer until 14 calendar days have elapsed.

That period shall run from either of the following the day after the simultaneous dispatch of the notifications to successful and unsuccessful tenderers.

Where fax or electronic means are used for the communication with tenderers, the standstill period shall be 10 calendar days

If only one tender has been received, there will not be a standstill period for signing the contract.

If necessary, the contracting authority may suspend signing of the contract for additional examination if justified by the requests or comments made by unsuccessful tenderers during the standstill period or any other relevant information received during that period. In that event, all the tenderers must be informed within three working days following the suspension decision.

Should it not be possible to conclude the contract with the successful tenderer or should they withdraw, Eurostat reserves the right to review its decision and to award the contract to another tenderer, to close the procedure or to abandon the procurement.

Any request for information and any reply will have neither the purpose nor the effect of suspending the deadline for lodging an appeal against the contract award decision, which must be done within two months of the notification.

d- No obligation to award the contract

Opening to competition or the launch of an invitation to tender in no way imposes on the Commission an obligation to award the contract. The Commission will not be liable for any compensation for tenderers whose tenders have not been accepted, nor will it be so liable if it decides to abandon the procurement or cancel the award procedure. This decision would be substantiated and notified to the tenderers.