|  |  |
| --- | --- |
|  | **The European Foundation for the Improvement of Living and Working Conditions (Eurofound)** |

**PROCUREMENT DOCUMENTS**

**PART C: STANDARD REPLY FORM**

**TITLE OF THE CONTRACT: Study on THE FUTURE OF MANUFACTURING - Policy developments and practices of apprenticeships in selected EU Member States and world competing regions**

**Internal Reference No.: 150009/4055**

|  |  |  |
| --- | --- | --- |
| **Lot number** | **Lot number** | **Lot(s) tendered for:*****Tick where appropriate 🗸*** |
| Lot 1 | Analytical review of apprenticeships in the manufacturing sector in selected EU Member States and world competing regions |  |
| Lot 2 | Adapting dual apprenticeship programmes to structural change and changing demands in the manufacturing sector - Case study examples |  |

***Tenderers should be in a position to submit tenders for both lots***

|  |  |
| --- | --- |
| **Name of the tenderer(*in block capitals*)** |  |
| **Name (*in block capitals*)*****(person authorised to submit an offer)*** |  |
| **Position/Job title** |  |
| **Signature\*** |  |
| **Place** |  |
| **Date** |  |

\* Signatures of all authorised members of the consortium shall be provided unless specific consortium agreement authorises the consortium leader to sign on behalf of all partners

***Text in blue bold italics: instructions to be deleted***

Parts highlighted in grey: provide information requested or delete if not relevant for specific tender.

Parts highlighted in blue: make a choice.

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# Identification of the Tenderer

Acting in the capacity of:

□ member of consortium (function: leader/member) – members of a consortium which are not the leader must only fill in the first table - 'identity', and the last table - 'declaration'.

□ single tenderer

Information to be included in the contract in the case of award

|  |  |
| --- | --- |
| **Identity** | Answer |
| Official name of tenderer in full |  |
| Official legal form |  |
| Country of registration |  |
| Statutory registration number |  |
| VAT registration number  |  |
| Official address of tenderer in full  |  |
| Internet address |  |
| Person(s) designated to sign the contract – name in full and function. Please indicate if the person(s) are authorised to sign alone or together |  |

***Table to be replicated for each of the consortium partners***

|  |  |
| --- | --- |
| Contact personDuring the **procurement stage** | Answer |
| Name in full and title of the person responsible for the tender |  |
| Function/Position |  |
| Telephone number |  |
| Email address |  |

|  |  |
| --- | --- |
| Contact personFor the proposed **contract** | Answer |
| Name in full and title of the person(s) responsible for the contract supervision |  |
| Function/Position |  |
| Company name |  |
| Address in full |  |
| Telephone number |  |
| Email address |  |
| IBAN number to be used for the contract |  |

**Declaration** by an authorised representative

|  |
| --- |
| I, the undersigned, certify that the information given in this tender is correct, that I accept the conditions set out in the invitation letter, the tender specifications and the draft contract and that the tender is valid. |
| Name in full and title |  |
| Position (e.g. “manager”) |  |
| DATE and SIGNATURE |  |

***Table to be replicated for each of the consortium partners***

The successful tenderer will be requested to provide documents proving that the person(s) designated to sign the contract and the person(s) signing the tender are authorised to do so.

## Questionnaire for joint tenders and subcontracting

***This questionnaire must only be completed if your tender involves a joint offer or subcontracting***

**Joint offer**

1. Does your tender involve more than one tenderer? Yes No

Consortium Agreement (template on p.7-8) and questions 2-4 must answered only if the answer to question 1 is “YES”.

2. Please fill in the name of the company having power of attorney for the consortium and acting as a leader:

…….….……………………………….……………………………………………………………….

3. Please fill in the names of the other companies taking part in the joint offer:

…….….……………………………….……………………………………………………………….

…….….……………………………….……………………………………………………………….

…….….……………………………….……………………………………………………………….

 4. If a consortium or similar entity exists, please fill in the name and the legal status of the entity:

…….….……………………………….……………………………………………………………….

**Subcontracting**

***To be filled only in case of subcontractors whose share of the contract value is above 5% or whose capacity is necessary to fulfil the selection criteria***

5. Does your tender involve subcontracting? Yes No

If so, please complete question number 6, and the next page once for each subcontractor. In addition subcontractor’s declaration of intent (template on p.9) must be provided as well.

6. List of subcontractors:

…….….……………………………….……………………………………………………………….

…….….……………………………….……………………………………………………………….

…….….……………………………….……………………………………………………………….

**Reasons, roles, activities and responsibilities of subcontractors**

Please complete this page once for each subcontractor:

Name of the subcontractor:

…….….……………………………….……………………………………………………………….

Official legal form:

…….….……………………………….……………………………………………………………….

Country of registration:

…….….……………………………….……………………………………………………………….

Statutory registration number:

…….….……………………………….……………………………………………………………….

Official address in full:

…….….……………………………….……………………………………………………………….

Contact person:

…….….……………………………….……………………………………………………………….

Telephone number:

…….….……………………………….……………………………………………………………….

Reasons for subcontracting:

…….….……………………………….……………………………………………………………….

Role, activities and responsibilities of the subcontractor:

…….….……………………………….……………………………………………………………….

Value of the subcontracting, as a percentage of the contract's value:

…….….……………………………….……………………………………………………………….

Do you intend to rely on the capacities of the subcontractor in order to fulfil the selection criteria? If yes, specify which selection criterion – financial and economic capacity, or technical and professional capacity – and be aware that the tenderer might be requested to provide the documents which make it possible to assess the selection criteria, to the extent that the subcontractor makes his resources available to the tenderer.

…….….……………………………….………………………………………..

## Consortium Agreement Form

**Consortium Agreement**

(giving power of attorney to one of the companies to act as consortium leader)

We, the undersigned:

– [*Name, Surname, Position, Company Name, Registered address, VAT number*]

– …..

– [*Name, Surname, Position, Company Name, Registered address, VAT number*],

having the legal capacity to act on behalf of the companies mentioned above (hereinafter "consortium members" and collectively as "the consortium"),

HEREBY AGREE AS FOLLOWS:

1. To create a consortium (without legal capacity) in order to submit a joint offer in response to call for tenders No [ ], lot [ ], title "[ ]" launched by Eurofound (European Foundation for the Improvement of Living and Working Conditions).

(2) To designate [*Company Name*] as the consortium leader.[[1]](#footnote-2)

(3) To give power of attorney to the consortium leader to submit the offer on behalf of the consortium members.

\*\*\*\*\*\*\*

(4) If the contract is awarded to the consortium,

(i) the consortium members shall:

1. be jointly and severally liable towards Eurofound for the performance of the contract;
2. comply with the terms and conditions of the contract and ensure proper execution thereof.

(ii) the consortium members give all the necessary powers to the consortium leader to act on their behalf, and in particular to:

1. sign all contractual documents - the contract itself, specific contracts/order forms and amendments, if applicable;
2. coordinate the execution of the contract by the consortium members and ensure its proper administration;
3. act as a single point of contact for Eurofound;
4. issue invoices related to the execution of the contract by the consortium.

(5) Payments by Eurofound related to the execution of the contract shall be made through the following bank account:

[*Bank account holder´s name, bank account number (IBAN), bank address*].

Any modification of this consortium agreement shall be subject to the written approval of Eurofound.

This consortium agreement shall take effect on the date of the last signature. It shall expire when all the obligations of the consortium members towards Eurofound in connection with the contract have ceased to exist. It cannot be terminated before that date without the written consent of Eurofound.

Name: [ ] Name: [ ]

Position: [ ] Position: [ ]

Company: [ ] Company: [ ]

Signature………………………………… Signature…………………………………

Signed in ……….………. on …………….……… Signed in ……….………. on …………….………

Name: [ ] Name: [ ]

Position: [ ] Position: [ ]

Company: [ ] Company: [ ]

Signature………………………………… Signature…………………………………

Signed in ……….………. on …………….……… Signed in ……….………. on …………….………

## Subcontractor’s Declaration of Intent

**DECLARATION OF INTENT.**

I the undersigned, Mr/Ms …………………………………………………………………………….

In my capacity as the subcontractor's representative, hereby declare:

|  |  |
| --- | --- |
| Name & address of the subcontractor |  |
| Number and title of the tendering procedure |  |
| Name of the tenderer  |  |

In the event that the contract is awarded to the aforementioned tenderer, the subcontractor undertakes to perform the subcontracted section of the aforementioned contract in accordance with the conditions of the tendering procedure and the tender submitted by the tenderer.

Done in ONE ORIGINAL COPY in ......................................... on .....................................................

Signature of legal representative of the subcontractor ……………………………………

## Legal Entity Form & Financial Identification Form

Legal Entity Form – to be provided by the successful tenderer only (including all members of the group in case of joint tender), is available on:
<http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm>

Financial Identification Form – to be provided by the successful tenderer (only one form per tender should be submitted; no form is needed for subcontractors and other members of the group in case of joint tender.), is available on:

<http://ec.europa.eu/budget/contracts_grants/info_contracts/index_en.cfm>.

This obligation to provide above mentioned forms and **supporting evidence**, as stipulated in the forms, may be lifted in such cases where the tenderer is already registered with the Financial Registration System of Eurofound.

# Verification of Non-Exclusion

## Declaration on honour on exclusion criteria and selection criteria

*To be provided by all tenderers. In case of joint tender, each member of the group must provide a declaration on honour signed by an authorised representative. In case of subcontracting, subcontractors whose share of the contract value is above 5 % or whose capacity is necessary to fulfil the selection criteria must provide a declaration on honour signed by an authorised representative.*

The successful tenderer will be obliged to provide the documents mentioned as supporting evidence in the declaration on honour before signature of the contract and within a deadline given by Eurofound. This requirement applies to each member of the group in case of joint tender and to subcontractors whose share of the contract value is above 5% and whose capacity is necessary to fulfil the selection criteria.

The undersigned [*insert name of the signatory of this form*], representing:

|  |  |
| --- | --- |
| (*only for natural persons*) himself or herself | (*only for legal persons*) the following legal person:  |
| ID or passport number:(‘the person’) | Full official name:Official legal form: Statutory registration number**:** Full official address: VAT registration number: (‘the person’) |

|  |
| --- |
| I – Situation of exclusion concerning the person |
|

|  |  |
| --- | --- |
| YES | NO |

1. declares whether the above-mentioned person is in one of the following situations
 |
| 1. it is bankrupt, subject to insolvency or winding up procedures, its assets are being administered by a liquidator or by a court, it is in an arrangement with creditors, its business activities are suspended or it is in any analogous situation arising from a similar procedure provided for under national legislation or regulations;
 | [ ]  | [ ]  |
| 1. it has been established by a final judgement or a final administrative decision that the person is in breach of its obligations relating to the payment of taxes or social security contributions in accordance with the law of the country in which it is established, with those of the country in which the contracting authority is located or those of the country of the performance of the contract;
 | [ ]  | [ ]  |
| 1. it has been established by a final judgement or a final administrative decision that the person is guilty of grave professional misconduct by having violated applicable laws or regulations or ethical standards of the profession to which the person belongs, or by having engaged in any wrongful conduct which has an impact on its professional credibity where such conduct denotes wrongful intent or gross negligence, including, in particular, any of the following:
 |
| (i) fraudulently or negligently misrepresenting information required for the verification of the absence of grounds for exclusion or the fulfilment of selection criteria or in the performance of a contract; | [ ]  | [ ]  |
| (ii) entering into agreement with other persons with the aim of distorting competition; | [ ]  | [ ]  |
| (iii) violating intellectual property rights; | [ ]  | [ ]  |
| (iv) attempting to influence the decision-making process of the contracting authority during the award procedure; | [ ]  | [ ]  |
| (v) attempting to obtain confidential information that may confer upon it undue advantages in the award procedure***;***  | [ ]  | [ ]  |
| 1. it has been established by a final judgement that the person is guilty of any of the following:
 |
| (i) fraud, within the meaning of Article 1 of the Convention on the protection of the European Communities' financial interests, drawn up by the Council Act of 26 July 1995; | [ ]  | [ ]  |
| (ii) corruption, as defined in Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of EU Member States, drawn up by the Council Act of 26 May 1997, and in Article 2(1) of Council Framework Decision 2003/568/JHA, as well as corruption as defined in the legal provisions of the country where the contracting authority is located, the country in which the person is established or the country of the performance of the contract; | [ ]  | [ ]  |
| (iii) participation in a criminal organisation, as defined in Article 2 of Council Framework Decision 2008/841/JHA; | [ ]  | [ ]  |
| iv) money laundering or terrorist financing, as defined in Article 1 of Directive 2005/60/EC of the European Parliament and of the Council; | [ ]  | [ ]  |
| (v) terrorist-related offences or offences linked to terrorist activities, as defined in Articles 1 and 3 of Council Framework Decision 2002/475/JHA, respectively, or inciting, aiding, abetting or attempting to commit such offences, as referred to in Article 4 of that Decision; | [ ]  | [ ]  |
| (vi) child labour or other forms of trafficking in human beings as defined in Article 2 of Directive 2011/36/EU of the European Parliament and of the Council; | [ ]  | [ ]  |
| 1. the person has shown significant deficiencies in complying with the main obligations in the performance of a contract financed by the Union’s budget, which has led to its early termination or to the application of liquidated damages or other contractual penalties, or which has been discovered following checks, audits or investigations by an Authorising Officer, OLAF or the Court of Auditors;
 | [ ]  | [ ]  |
| 1. it has been established by a final judgment or final administrative decision that the person has committed an irregularity within the meaning of Article 1(2) of Council Regulation (EC, Euratom) No 2988/95;
 | [ ]  | [ ]  |
| 1. for the situations of grave professional misconduct, fraud, corruption, other criminal offences, significant deficiencies in the performance of the contract or irregularity, the applicant is subject to:
2. facts established in the context of audits or investigations carried out by the Court of Auditors, OLAF or internal audit, or any other check, audit or control performed under the responsibility of an authorising officer of an EU institution, of a European office or of an EU agency or body;
3. non-final administrative decisions which may include disciplinary measures taken by the competent supervisory body responsible for the verification of the application of standards of professional ethics;
4. decisions of the ECB, the EIB, the European Investment Fund or international organisations;
5. decisions of the Commission relating to the infringement of the Union's competition rules or of a national competent authority relating to the infringement of Union or national competition law; or
6. decisions of exclusion by an authorising officer of an EU institution, of a European office or of an EU agency or body.
 | [ ]  | [ ]  |
| II – Situations of exclusion concerning natural persons with power of representation, decision-making or control over the legal person ***Not applicable to natural persons, Member States and local authorities*** |
| 1. declares that a natural person who is a member of the administrative, management or supervisory body of the above-mentioned legal person, or who has powers of representation, decision or control with regard to the above-mentioned legal person (this covers company directors, members of management or supervisory bodies, and cases where one natural person holds a majority of shares) is in one of the following situations:
 | YES | NO | N/A |
| Situation (c) above (grave professional misconduct) | [ ]  | [ ]  | [ ]  |
| Situation (d) above (fraud, corruption or other criminal offence) | [ ]  | [ ]  | [ ]  |
| Situation (e) above (significant deficiencies in performance of a contract ) | [ ]  | [ ]  | [ ]  |
| Situation (f) above (irregularity) | [ ]  | [ ]  | [ ]  |

|  |
| --- |
| III – Situations of exclusion concerning natural or legal persons assuming unlimited liability for the debts of the legal person |
| 1. declares that a natural or legal person that assumes unlimited liability for the debts of the above-mentioned legal person is in one of the following situations:
 | YES | NO | N/A |
| Situation (a) above (bankruptcy) | [ ]  | [ ]  | [ ]  |
| Situation (b) above (breach in payment of taxes or social security contributions) | [ ]  | [ ]  | [ ]  |

|  |
| --- |
| IV – Grounds for rejection from this procedure |
| 1. declares that the above-mentioned person:
 | YES | NO |
| 1. has not distorted competition by being previously involved in the preparation of procurement documents for this procurement procedure;
 | [ ]  | [ ]  |

V – Remedial measures

If the person declares one of the situations of exclusion listed above, it should indicate the measures it has taken to remedy the exclusion situation, thus demonstrating its reliability. They may include e.g. technical, organisational and personnel measures to prevent further occurrence, compensation of damage or payment of fines. The relevant documentary evidence which appropriately illustrates the remedial measures taken should be provided in annex to this declaration. This does not apply for the situations referred in point (d) of this declaration.

VI – Evidence upon request

Upon request and within the time limit set by the contracting authority the person shall provide information on the persons that are members of the administrative, management or supervisory body, as well as the following evidence concerning the person or the natural or legal persons which assume unlimited liability for the debt of the person:

For situations described in (a), (c), (d) or (f), production of a recent extract from the judicial record is required or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of establishment of the person showing that those requirements are satisfied.

For the situation described in point (a) or (b), production of recent certificates issued by the competent authorities of the State concerned are required. These documents must provide evidence covering all taxes and social security contributions for which the person is liable, including for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions. Where any document described above is not issued in the country concerned, it may be replaced by a sworn statement made before a judicial authority or notary or, failing that, a solemn statement made before an administrative authority or a qualified professional body in its country of establishment.

The person is not required to submit the evidence if it has already been submitted for another procurement procedure. The documents must have been issued no more than one year before the date of their request by the contracting authority and must still be valid at that date.

The signatory declares that the person has already provided the documentary evidence for a previous procedure and confirms that there has been no change in its situation:

|  |  |
| --- | --- |
| **Document** | **Full reference to previous procedure** |
| *Insert as many lines as necessary.* |  |

|  |
| --- |
| VII – Selection criteria  |
| 1. declares that the above-mentioned person complies with the selection criteria applicable to it individually as provided in the tender specifications:
 | YES | NO | N/A |
| 1. It has the legal and regulatory capacity to pursue the professional activity needed for performing the contract as required in section [*insert*] of the tender specifications;
 | [ ]  | [ ]  | [ ]  |
| 1. It fulfills the applicable economic and financial criteria indicated in section [*insert*] of the tender specifications;
 | [ ]  | [ ]  | [ ]  |
| 1. It fulfills the applicable technical and professional criteria indicated in section [*insert*] of the tender specifications.
 | [ ]  | [ ]  | [ ]  |

*The contracting authority must adapt the table above to the criteria indicated in the tender specifications (i.e. insert extra rows for each criterion or delete irrelevant rows).*

|  |  |  |  |
| --- | --- | --- | --- |
| 1. if the above-mentioned person is the sole tenderer or the leader in case of joint tender, declares that:
 | YES | NO | N/A |
| 1. the tenderer, including all members of the group in case of joint tender and including subcontractors if applicable, complies with all the selection criteria for which a consolidated asseessment will be made as provided in the tender specifications.
 | [ ]  | [ ]  | [ ]  |

VII – Evidence for selection

The signatory declares that the above-mentioned person is able to provide the necessary supporting documents listed in the relevant sections of the tender specifications and which are not available electronically upon request and without delay.

The person is not required to submit the evidence if it has already been submitted for another procurement procedure. The documents must have been issued no more than one year before the date of their request by the contracting authority and must still be valid at that date.

The signatory declares that the person has already provided the documentary evidence for a previous procedure and confirms that there has been no change in its situation:

|  |  |
| --- | --- |
| **Document** | **Full reference to previous procedure** |
| *Insert as many lines as necessary.* |  |

***The above-mentioned person may be subject to rejection from this procedure and to administrative sanctions (exclusion or financial penalty) if any of the declarations or information provided as a condition for participating in this procedure prove to be false.***

Full name Date Signature

# Selection of Tenderers

## Economic and financial capacity

**To be provided by the tenderers:**

* **Declaration on honour** (contained in point 2.1 of the Standard Reply Form), signed and dated by an authorised representative, stating that they fulfil economic and financial criteria applicable to them.

**Evidence to be provided by the tenderers:**

The successful tenderer (including each member of the group in case of joint tender) will be requested to provide the following evidence:

* **For-Profit Organisations** (*whose primary goal is making a profit*):
	+ duly completed and signed **Simplified Financial Statement**, available on the Procurement Section ([Procurement](http://www.eurofound.europa.eu/about/procurement)) on Eurofound’s webpage[[2]](#footnote-3);
	+ **copy of the profit and loss accounts and balance sheet for the last two years** for which accounts have been closed from each concerned legal entity;
* **Non-Profit Organisations** (*formed for the purpose of serving a public or mutual benefit other than the pursuit or accumulation of profits for owners or investors*):
	+ duly completed and signed **Simplified Financial Statement**, available on the Procurement Section ([Procurement](http://www.eurofound.europa.eu/about/procurement)) on Eurofound’s webpage[[3]](#footnote-4);
	+ **Copy of the statement of financial activities and statement of the financial position for the last two years** for which accounts have been closed;
* **Public sector entities** (*including public universities, which according to the law of the country in which they are established are NOT required to publish balance sheets*):
	+ complete line 14 (Revenue) of the Simplified Financial Statement only (version for non-profit organisations), available on the Procurement Section ([Procurement](http://www.eurofound.europa.eu/about/procurement)) on Eurofound’s webpage;
	+ provide **extracts from their last three budgets** (including the current one) as evidence of their average budget amounting to at least € 260.000,
* **Individuals**:
	+ only complete line 14 (Revenue) of the Simplified Financial Statement (version for non-profit organisations), available on the Procurement Section ([Procurement](http://www.eurofound.europa.eu/about/procurement)) on Eurofound’s webpage,
	+ provide **extracts from any available documents** (e.g. income tax returns) as evidence on their average income for the last three financial years amounting to at least € 260.000*;*
* **Evidence of professional risk indemnity insurance** (this criterion applies to the leader in case of a joint tender);

## Professional and Technical Capacity

**To be provided by all the tenderers:**

* **Declaration on honour** (contained in point 2.1 of the Standard Reply Form), signed and dated by an authorised representative, stating that they fulfil the technical and professional criteria applicable to them.
* **Short description of the tenderers economic activities** (one altogether for all entities involved).

### Criteria relating to tenderers

The evidence must be provided together with the tender.

- **Criterion A1**: The tenderer must prove experience in the field of Policy developments and practices of apprenticeships in selected EU Member States and world competing regions as well as in survey techniques, data collection, statistical analyses, drafting reports and recommendations.

**Evidence A1**: the tenderer must provide references for 2 projects delivered in these fields in the last five years with a minimum value for each project of € 90.000.

- **Criterion A2**: The tenderer must prove capacity to work in at least five EU official languages.

**Evidence A2**: the tenderer must provide references for 2 projects delivered in the last three years showing the necessary language coverage.

- Criterion A3: The tenderer must prove capacity to draft reports in English.

Evidence A3: the tenderer must provide one document of at least 10 pages (report, study, etc.) in this language that it has drafted and published or delivered to a client in the last two years. The verification will be carried out on 5 pages of the document.

- **Criteria relating to the team delivering the service:**

For each member of the team proposed, the tenderer should indicate in its offer under which staff profile specific team members fall for the duration of the contract. The category should be determined in accordance with the level of qualification as outlined in point 5.3.4 of the Tender Specifications.

Evidence will consist in CVs of the team responsible to deliver the service which shall be provided together with the tender. Each CV should indicate the intended function in the delivery of the service. Eurofound recommends submitting the CVs in EU (Europass) format which can be accessed at:

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

In case of joint tender or subcontracting, the criteria applicable to the tenderer as a whole will be verified by combining the various declarations for a consolidated assessment.

### Criteria relating to the team delivering the service

**Evidence to be provided by all the tenderers:**

* **CVs of the following key team members** delivering the service (each CV should indicate the intended function in the delivery of the service):
* B1 - Project Manager: At least four years relevant experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project of a similar size (at least € 90.000) and coverage (at least five selected EU Member States and two world competing regions covered), with experience in management of team of at least fivepeople.
* Evidence: CV
* B2 - Expert in conducting comparative research / case studies / surveys: At least four years of professional experience. Relevant higher education degreeor equivalent professional experienceand at least three years' professional experience in the field.
* Evidence: CV
* B3 - Team for data collection: collectively the team of at least five people should have knowledge of four EU languages (e.g. German, Italian, French and including English) and past relevant experience of three years in data collection techniques indicated in the CV.
* Evidence: CV.
* B4 - Language quality check: at least two members of the team should have at least C1 level in the Common European Framework for Reference for Languages[[4]](#footnote-5) in English.
* Evidence: a language certificate or past relevant experience indicated in the CV.

# Technical Offer

The technical offer must cover all aspects and tasks required in the technical specifications and provide all the information needed to apply the award criteria as listed in point 5.4 of the Tender Specifications. Offers deviating from the requirements or not covering all requirements may be rejected on the basis of non-compliance with the tender specifications and will not be evaluated.

# Financial Offer

The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to bear the risks or the benefits deriving from any variation.

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

The quoted price must be a fixed amount which includes all charges (including travel and subsistence). Travel and subsistence expenses are not refundable separately.

Eurofound reserves the right not to select a contractor if the price of the tenders proposed is in excess of the budget allocated to this project.

Where a maximum budget is mentioned in the Tender Specifications, financial proposals exceeding this amount will be rejected.

**COST TABLE**

|  |  |
| --- | --- |
| **Breakdown** | **Cost** |
| **Lot 1**  |
| Final country reports (EU and world competing regions) |  |
| Final comparative overview, abstract and executive summary |  |
| Kick off meeting lot 1 |  |
| Participation to a Regional Industrial Policy seminar organised by Eurofound in 2016/Quarter4 expected to be held in the Basque Country (Spain). |  |
| **Lot 2** |
| Final case study reports |  |
| Comparative overview report |  |
| Kick off meeting lot 2 |  |
| **TOTAL PRICE[[5]](#footnote-6):** |  |

|  |  |
| --- | --- |
| **Name in full and title(*in block capitals*)** |  |
| **Function/Position (*in block capitals*)*****(person authorised to sign the tender)*** |  |
| **Signature** |  |
| **Date** |  |

# Statements concerning IPR

If, for the purpose of the contract, pre-existing material will make up any part of the final results, this needs to be declared in the tender proposal. Information must be provided about the scope of pre-existing materials, their source and when and how the rights to these materials have been or will be acquired.

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

The successful contractor, to which the contract is awarded, will be requested to establish a list of all pre-existing rights and rights of creators and third parties on the results of this contract or parts thereof. This list will have to be provided no later than the date of delivery of the final results.

## Declaration on the list of pre-existing rights

***This declaration is compulsory for all service contracts***

***To be provided no later than the date of delivery of the final results***

I, insert name of the authorised representative of the contractor representing insert name of the contractor (‘the contractor’), party to the direct contract insert title and number

***option 1:*** warrant that the results are free of rights or claims from creators or from any third parties for any use Eurofound may envisage and declare that the results do not contain any pre-existing rights to the results or parts of the results or to pre-existing materials as defined in the above-mentioned contract.

***option 2:*** warrant that the results and the pre-existing material incorporated in the results are free of rights or claims from creators or from any third parties for any use Eurofound may envisage and declare that the results contain the following pre-existing rights:

**Please fill in the table – one line per pre-existing right**

|  |  |  |  |
| --- | --- | --- | --- |
| **Result concerned** | **Pre-existing material concerned** | **Rights to pre-existing material** | **Identification of rights’ holder** |
|  |  |  |  |
|  |  |  |  |

## Statement of contractor concerning rights to delivered results

***(Use of this annex is optional and guarantees the chain of transfers of rights on the contractor’s side)***

I, *insert name of the authorised representative of the contractor* representing *insert name of the contractor*, party to the framework / specific contract *insert title and number* (‘the contractor’) warrant that the contractorholds all rights to the delivered results listed below *insert titles and description of relevant results*.

The above-mentioned results were prepared by *insert names of creators*. The creators transferred all their relevant rights to the results to the contractor *insert name of the rights holder* through an agreement / an employment contract / a relevant extract of which is attached to this statement.

The creators received all their remuneration on *insert date* / will receive all their remuneration as agreed within *complete* weeks from delivery of this statement / receipt of confirmation of acceptance of the work. / The statement of the creators confirming payment is attached.

Date, place, signature

## Statement by the creator (or right holder)

**Concerning *insert* *name of the relevant result* delivered as part of the direct contract *insert title and number*
concluded between Eurofound and *name of the contractor***

***(Use of this annex is optional and guarantees that the creator agrees to transfer of rights)***

I the undersigned *insert name of the creator or authorised representative of the right holder* / representing *insert name of the right holder* declare that I am the right holder of: *identify the relevant parts of the result* which I created / for which I received rights from *insert name of other right holder*.

I am aware of the above direct contract, especially Articles I.10 and II.13 concerning intellectual property rights and exploitation of the results and I confirm that I transferred all the relevant rights to *insert name of contractor or other intermediary right holder*.

I declare that I have received full remuneration / I agreed to receive remuneration by *insert date*.

As creator, I also confirm that I do not object to the following:

1. that my name be mentioned or not mentioned when the results are presented to the public;
2. that the results be divulged or not after they have been delivered in their final version to Eurofound;
3. that the results be adapted, provided that this is done in a manner which is not prejudicial to my honour or reputation.

Date, place, signature

# Checklist

|  |  |
| --- | --- |
| Delivery method: In person or by courier1 tender marked ‘Original’ – unbound/unstapled, 2 copies of the tender *change as required*. Double envelope system applied (as per point 6 of the Invitation to Tender) |  |
| Tender administrative data allowing its identification provided (including information on consortium partners and subcontracting) |  |
| Declaration on Exclusion and Selection provided |  |
| Selection criteria evidence (including CVs) |  |
| Financial offer provided |  |
| List of pre-existing rights and third parties’ rights provided - see point 3.7 of Tender Specifications (*if applicable*) |  |

1. The consortium leader must be one of the consortium members. [↑](#footnote-ref-2)
2. <http://www.eurofound.europa.eu/about/procurement/generalinfo.htm>. [↑](#footnote-ref-3)
3. <http://www.eurofound.europa.eu/about/procurement/generalinfo.htm>. [↑](#footnote-ref-4)
4. See <http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp> [↑](#footnote-ref-5)
5. The price shall include all costs (travel costs, overhead costs, etc.) to be borne for the performance of the contract. [↑](#footnote-ref-6)