



EUROPEAN COMMISSION
EUROSTAT

Directorate F: Social statistics

Unit F-5: Education, health and social protection

ORIGINAL EN

Unit: F-5 Education, health and social protection

Invitation to tender for the supply of statistical services

Support for Social protection statistics

(ESTAT/F/2018/015)

e-Submission

TABLE OF CONTENTS

SECTION 1	INTRODUCTION.....	3
1.1	<i>Presentation of Eurostat.....</i>	3
1.2	<i>Subject of the contract.....</i>	3
1.3	<i>Glossary.....</i>	3
SECTION 2	TECHNICAL INFORMATION ON LOT X.....	4
2.1	<i>General information and objectives.....</i>	4
2.2	<i>Volume of the contract.....</i>	8
2.3	<i>Tasks and expected results.....</i>	9
2.4	<i>Meetings and missions.....</i>	13
2.5	<i>Duration and timetable.....</i>	14
2.6	<i>Minimum requirements.....</i>	14
2.7	<i>Technical implementation reports.....</i>	15
2.8	<i>Assessment of results.....</i>	15
2.9	<i>Specific conditions.....</i>	16
SECTION 3	INFORMATION ON THE CONTRACT.....	17
3.1	<i>General information.....</i>	17
3.2	<i>Payments.....</i>	17
3.3	<i>Replacement of persons assigned to carry out the work.....</i>	17
3.4	<i>Personal data and intellectual property rights.....</i>	18
3.4.1	<i>Personal data.....</i>	18
3.4.2	<i>Intellectual property rights.....</i>	18
3.5	<i>E-prior.....</i>	18
SECTION 4	INFORMATION ON THE TENDER PROCEDURE.....	20
4.1	<i>General information.....</i>	20
4.2	<i>Who may participate in this invitation to tender.....</i>	20
4.3	<i>How to send a tender.....</i>	22
4.3.1	<i>General Information.....</i>	22
4.3.2	<i>Date and place of opening of the tenders.....</i>	23
4.3.3	<i>Contact with Eurostat.....</i>	24
4.3.4	<i>Period of validity of the tender.....</i>	25
4.4	<i>Structure of the tender.....</i>	25
4.4.1	<i>Section One: Parties :identification of the tenderer.....</i>	26
4.4.2	<i>Section Two: Exclusion criteria.....</i>	30
4.4.3	<i>Section Three: Selection criteria.....</i>	31
4.4.4	<i>Section Four: Technical tender.....</i>	32
4.4.5	<i>Section Five: Financial tender.....</i>	33
4.4.6	<i>Section Six: Tender report.....</i>	33
4.5	<i>Evaluation and award.....</i>	34
4.5.1	<i>Exclusion and selection of tenderers.....</i>	35
4.5.2	<i>Compliance with minimum requirements.....</i>	38
4.5.3	<i>Award of the contract.....</i>	38

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, businesses, universities and a wide range of other users. Eurostat also supports non-member countries, including the candidate countries, in adapting their statistical systems.

More information can be found on the Eurostat's website:

<http://ec.europa.eu/eurostat>

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

1.2 Subject of the contract

This invitation to tender covers the provision of statistical services to support the European System of integrated Social PROtection statistics (ESSPROS) over a period of two years and nine months (during 2019 – 2021). The statistical services to be provided by the contractor are related to the support for methodological development for the existing ESSPROS data collections and for a new ESSPROS module on beneficiaries other than pensioners, to the support for meetings and to statistical training within the ESSPROS framework.

1.3 Glossary

EU	EUROPEAN UNION
ESSPROS	THE EUROPEAN SYSTEM OF INTEGRATED SOCIAL PROTECTION STATISTICS
CIRCABC	COMMUNICATION AND INFORMATION RESOURCE CENTRE FOR ADMINISTRATION, BUSINESSES AND CITIZENS (A COLLABORATIVE WORKSPACE WITH PARTNERS OF THE EUROPEAN INSTITUTIONS)
DG EMPL	DIRECTORATE GENERAL FOR EMPLOYMENT, SOCIAL AFFAIRS AND INCLUSION
DG ECFIN	DIRECTORATE GENERAL FOR ECONOMIC AND FINANCIAL AFFAIRES
DG TAXUD	DIRECTORATE GENERAL FOR TAXATION & CUSTOMS UNION
OECD	ORGANIZATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT
ILO	INTERNATIONAL LABOUR ORGANIZATION
ESA	EUROPEAN SYSTEM OF NATIONAL AND REGIONAL ACCOUNTS IN THE EUROPEAN UNION
SHA	SYSTEM OF HEALTH ACCOUNTS

SECTION 2 TECHNICAL INFORMATION

2.1 General information and objectives

The European System of integrated Social PROtection Statistics (ESSPROS) was developed in the late '70s by Eurostat jointly with representative of the Member States of the European Union in response to the need for a specific instrument of statistical observation of social protection in the Member States.

The objectives of ESSPROS are to provide a comprehensive and coherent description of social protection in the Member States:

- covering social benefits and their financing;
- geared to international comparability;
- harmonising with other statistics, particularly the national accounts, in its main concepts.

ESSPROS provides a coherent comparison between European countries of social benefits to households and their financing. Social benefits are transfers to households, in cash or in kind intended to relieve them from the financial burden of a number of risks or needs.

The risks or needs of social protection refer to the ESSPROS "functions". The functions are disability, sickness/health care, old age, survivors, family/children, unemployment, housing and social exclusion. Education is excluded from the scope of ESSPROS.

Social benefits are made through collectively organised schemes by government and/or collective agreements. By definition the social protection includes all interventions from private and public bodies intended to relieve households and individuals from the financial burden of a defined set of risks and needs. The statistical unit in the ESSPROS system is called social protection scheme. A scheme is a distinct body of rules supported by one or more institutional units. Interventions that are based on individual arrangements or where simultaneous reciprocal arrangements exist are not regarded as social protection.

An essential element of ESSPROS is the collection of the so called "qualitative information". Social protection systems differ a lot from country to country; therefore, each scheme for which data are collected is described in details in a metadata file which is available on a dedicated page of the Eurostat website.

ESSPROS is composed of the core system and of modules.

The core system contains annual data of social protection receipts and expenditures starting from the year 1990. The modules contain supplementary statistical information on particular aspects of social protection:

- the module on pensions' beneficiaries;
- the module on net social benefits.

The annual data collection for the module on pensions' beneficiaries has been launched in 2008. The aim of the module on pension beneficiaries is to provide the total number of beneficiaries:

- for each of the seven categories of pensions

- for each of the four functions grouping these categories (i.e. disability, old-age, survivors and unemployment)
- for the "old-age and survivors" function
- for the aggregation of the four functions, at 'Total' level

The project on Net Benefits that has been developed in the past years (2007-2009) under the "restricted approach", gives an important overview to the policy-makers about the net expenditure, as the effects of the fiscal systems which may reduce the final value of social protection benefits to recipients and reduce the net cost of the state, are taken into account.

Article 2 of the ESSPROS Regulation (EC) No 458/2007 of the European Parliament and of the Council defines net social protection benefits to be “the value of social protection benefits excluding taxes and social contributions paid by the benefits’ recipients complemented by the value of fiscal benefits” where fiscal benefits are defined to be “social protection provided in the form of tax breaks that would be defined as social protection benefits if they were provided in cash, excluding tax breaks promoting the provision of social protection or promoting private insurance plans”. This definition marks out two separate elements to net benefits.

- The first – social protection benefits less taxes and social contributions paid on those benefits by their recipients – implies no change to the scope of the Core system. It represents a strict conversion from gross expenditure to net expenditure after taking into account the value of taxes and social contributions paid on gross benefits. By definition, the population of recipients of net and gross benefits must be the same. This is known as the “restricted approach” to measuring net benefits.

- The second element – fiscal benefits – potentially enlarges the scope of the net benefits module compared to the Core system because it includes the value of social benefits implemented solely through the fiscal system, which are not included in the Core system. Fiscal benefits reduce the amount of taxes and/or social contributions paid on all forms of income (e.g. from employment) and therefore increase the disposable income of beneficiaries in addition to the social benefits recorded in the Core system. Moreover, fiscal benefits may accrue to persons who receive no social benefits paid in cash or in kind who are therefore not members of the population of benefit recipients covered by the Core system. Adding the value of fiscal benefits to the value of net benefits according to the restricted approach is known as the “enlarged” approach to measuring net benefits.

The "restricted approach" exercise became compulsory for the Member States by the regulation starting from the collection of 2010 reference data (collected end of 2012).

Currently ESSPROS collects data from the 28 EU Member States, Iceland (IS), Norway (NO), Switzerland (CH), Serbia (RS), Turkey (TR) and Bosnia and Herzegovina (BA). It is possible that other Candidate or Potential Candidate countries will gradually start participating. Eurostat also collects the Quality Reports of each respective data collection. In the coming years it is expected that further accessing/candidate countries will be fully compliant with ESSPROS framework.

The main ESSPROS data users are: European Commission services (mainly DG EMPL but also DG ECFIN, DG SANTE, DG TAXUD), other international organisations as OECD, ILO, UNICEF and also Member States of the European Union.

Within the context of the current economic crisis the social protection area is the one which is affected the most: unemployment benefits grow, new pensions reforms are put in place, supporting families most in need is increasing, etc.

All these aspects make the social protection statistics data important, visible and needed for the policy-makers. In this respect ESSPROS is providing input for the work undertaken by the Social Protection Committee and its sub-groups, such as the Indicators' Sub-Group.

The Social Protection Committee (SPC) is a Treaty-based Committee (Article 160 of the Treaty on the Functioning of the EU) which was formally created through Council Decisions. The SPC serves as a vehicle for cooperative exchange between Member States and the European Commission in the framework of the Open Method of Co-ordination on social inclusion, health care and long-term care as well as pensions.

In particular, the Committee plays a central role in preparing the discussion in the Council on the annual Joint Report on Social Protection and Social Inclusion. The Committee also prepares reports, formulates opinions or undertakes other work within its fields of competence, at the request of either the Council or the Commission or on its own initiative.

The Indicators' Sub-Group (ISG) of the SPC was created in 2001. It is responsible for the formulation and definition of indicators to be used for monitoring countries' progress towards the commonly agreed objectives, which underpin the Open Method of Coordination in relation to social inclusion, pensions, health and long-term care.

The ISG also helps the EU to improve its capacity to gather relevant statistics, carries out analytical work on the basis of the agreed indicators and develops analytical frameworks in support of the policy reviews conducted by the SPC.

For further detail please check the following link:

<http://ec.europa.eu/social/main.jsp?catId=758&langId=en>

The use of ESSPROS data in policy analysis at European level has increased significantly in recent years. Moreover, the new consensus with the European Commission to rebalance economic and social objectives places greater emphasis on social indicators and is likely to further increase demands for more timely data and for a wider range of data than ESSPROS currently provides.

It is clear that the ESSPROS system has to develop to meet such needs but, at the same time, that the needs and wishes of data users have to be balanced with costs and the practical issues confronting data providers. Consequently, Eurostat has consulted extensively with both users and providers through two questionnaires and the ESSPROS conference in November 2014. According to the decision of the Working Group on Social Protection Statistics in March 2015 a Task Force was established to start working on the following topics:

- Methodological review of the existing ESSPROS system
- Links between ESSPROS and national accounts

The ESSPROS Task Force on Methodology is intended to be a forum for detailed technical discussion aimed at improving and further developing the ESSPROS methodological documents in order to support the continued provision of high quality

data on social protection and better meet the needs of data users, in particular improving timeliness.

Reference documents and websites

Legal base

Core system and Pension Beneficiaries

- Regulation (EC) No 458/2007 of the European Parliament and of the Council of 25 April 2007 on the European system of integrated social protection statistics.

<http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:113:0003:0008:EN:PDF>

- Commission Regulation (EC) No 1322/2007 of 12 November 2007 implementing Regulation (EC) No 485/2007 of the European Parliament and of the Council on the European system of integrated social protection statistics (ESSPROS) as regards the appropriate formats for transmission, results to be transmitted and criteria for measuring quality for the ESSPROS core system and the module on pension beneficiaries.

<http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2007:294:0005:0010:EN:PDF>

- Commission Regulation (EC) No 10/2008 of 8 January 2008 implementing Regulation (EC) No 485/2007 of the European Parliament and of the Council on the European system of integrated social protection statistics (ESSPROS) as regards the definitions, detailed classifications and updating of the rules for dissemination for the ESSPROS core system and the module on pension beneficiaries.

<http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2008:005:0003:0012:EN:PDF>

Net benefits module

Commission Regulation (EU) No 263/2011 of 17 March 2011 implementing Regulation (EC) No 458/2007 of the European Parliament and of the Council on the European system of integrated social protection statistics (ESSPROS) as regards the launch of full data collection for the ESSPROS module on net social protection benefits

<http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:071:0004:0008:EN:PDF>

Commission Regulation (EU) No 110/2011 of 8 February 2011 implementing Regulation (EC) No 458/2007 of the European Parliament and of the Council on the European system of integrated social protection statistics (ESSPROS) as regards the appropriate formats for the transmission of data, the results to be transmitted and the criteria for measuring quality for the ESSPROS module on net social protection benefits.

<http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:034:0029:0032:EN:PDF>

Manual

<http://ec.europa.eu/eurostat/web/products-manuals-and-guidelines/-/KS-RA-11-014>

Manual and user guidelines

<http://ec.europa.eu/eurostat/web/products-manuals-and-guidelines/-/KS-GQ-16-010>

Data

Data on Expenditure, Pension beneficiaries and Net benefits

<http://ec.europa.eu/eurostat/web/social-protection/data/database>

Data by scheme

<https://ec.europa.eu/eurostat/web/social-protection/data/data-by-scheme>

Qualitative information:

<http://ec.europa.eu/eurostat/web/social-protection/data/qualitative-information>

Quality reports

The consolidated Quality Reports are published in the ESSPROS "Dedicated section" on the Eurostat website. In addition to the consolidated quality reports, the national quality reports are made available on line.

<http://ec.europa.eu/eurostat/web/social-protection/quality/consolidated-quality-report>

Core system:

<http://ec.europa.eu/eurostat/web/social-protection/quality/national-quality-reports-core-system>

Pension beneficiaries:

<http://ec.europa.eu/eurostat/web/social-protection/quality/national-quality-reports-pension-beneficiaries>

Net benefits:

http://epp.eurostat.ec.europa.eu/portal/page/portal/social_protection/quality/National_quality_reports_on_net_social_protection_benefits

Other reference documentation is referred to in the paragraph 2.3 of the present document.

2.2 Volume of the contract

The total volume of the work for the entire contract period is **estimated** to cover:

- 265 man / day for the first 9 months;
- 335 man / day per year over the next two years.

The **estimated** total value is EUR 560000 for the entire duration of the contracts 33 months (1 contract X 9 months and 2 contracts X 12 months each).

Due to budgetary constraints, the maximum value for the first contract (duration 9 months) must not exceed 160,000 euros (financial proposal for year 1 in Annex 6 Compulsory reply for financial tender). Offers exceeding this maximum value for first contract will be rejected.

2.3 Tasks and expected results

Task 1- Methodological development of the existing ESSPROS data collections

Task 1.A – Methodological documents for the ESSPROS meetings

The aim of this task is to provide Eurostat with support for the improvement of the methodology of the existing ESSPROS data collections: the Core system, the module on Pension beneficiaries and the module on NET social benefits.

The contractor will be requested, under the direction of Eurostat, to draft and finalise methodological documents according to Eurostat requests. These documents are aimed to be integrated into the existing methodological documentation for ESSPROS, in particular the "Manual and User guidelines" and the "Compendium of methodological clarifications". The contractor will support Eurostat in the implementation of the decisions taken by the Working Group in the context of the methodological aspects related to the scope of the current call for tender. The decisions taken by the Working Group may have implications to the methodological aspects as for example links with other related statistics and methodologies (for example national accounts, SHA), and they can represent the input for the work of the Task Force on Methodology.

The ESSPROS Task Force on Methodology should focus work mainly in four areas:

- **Methodological review of the existing ESSPROS system:** review and address borderlines between different ESSPROS concepts (i.e. functions...etc.) and grey areas in definitions in order to ensure consistent application of these among participating countries and thereby improve the quality of ESSPROS data and metadata. The methodological review should attempt to address such inconsistencies by clearly identifying existing problems and proposing appropriate solutions.

- **Links between ESSPROS and national accounts:** there is a strong interest in establishing better links between ESSPROS and National Accounts. Areas of work could include:

- The development of link tables (i.e. country specific tables identifying the links between ESSPROS and National Accounts)
- Assisting further countries in establishing links between the two statistical systems

The above mentioned work area require a comprehensive analysis of the links between the two systems with reference to: (a) conceptual aspects, (b) data comparison and (c) data production process.

- **Improving timeliness:** this work focuses mainly on the new data collection (currently on a pilot phase) of "Early estimates" for ESSPROS main indicators, corresponding to the total social benefits with a breakdown by function. This data collection can exploit the results of the links with National Accounts, in order to derive in advance the ESSPROS aggregates, after the necessary adjustments.

- **Extension of the number of beneficiaries:** this work is related to the activities included in Task 2 of this tender.

Ultimately the methodological work of the Task force is expected to lead to improvement of the ESSPROS Manual and User guidelines and to an extension of the "Compendium of methodological clarifications". Any proposals made by the Task Force to revise the ESSPROS Manual and User guidelines and to update the "Compendium of methodological clarifications" will be subject to approval of the Working Group on Social Protection Statistics.

Agendas and documents of the latest Working Group meetings can be found in CIRCABC at the following link:

<https://circabc.europa.eu/w/browse/ad624574-4c28-43d6-a9ff-b75ab573c0d5>

Agendas and documents of the latest Task Force meetings can be found in CIRCABC at the following link:

<https://circabc.europa.eu/w/browse/280d89ed-6107-4640-8d03-fb1d29b9b292>

The contractor will provide methodological documents on the areas mentioned above, except for the "Extension of the number of beneficiaries" which relates to Task 2 of this tender. These documents will serve as input to the Task Force and the Working group discussions. The final version of these methodological documents shall be ready in English at least four weeks before the Task Force / Working group meeting. The Task force usually takes place in November, and the Working group in May.

Task 1.B – Methodological support - answering user and data provider requests

Eurostat receives many specific methodological questions raised by users and providers of ESSPROS data. These may concern issues related to data, questions on definitions, questions related to different classifications in relation to our existing methodology, etc.

As expected result, the contractor will be asked to support Eurostat in drafting the answer of the most complex methodological questions raised. In some cases, the replies can involve a proposal to improve the current methodology and to clarify some specific methodological issues that can lead to misinterpretation from both producers and users sides.

In principle, the number of questions for which the contractor will be asked to support Eurostat is estimated at 5/6 methodological questions per year (per contract). As for the expected delivery time of this deliverable, in general, the draft replies should be sent to Eurostat within maximum 15 working days depending on the complexity of the question. Examples of user and/or data provider questions can be found at the following link in CIRCABC:

<https://circabc.europa.eu/w/browse/0af01087-4c46-4e81-8ad9-caba20f4fcad>

The expected results for task 1 are:

For the first contract (9 months):

D1A – about 6 draft and final documents for the ESSPROS Task Force on the methodology of the ESSPROS data collections

D1B – about 4 answers to methodological questions

For each of the next two renewal contracts (12 months each):

D1A – about 12 draft and final documents for the ESSPROS Working Group and Task Force on the methodology of the ESSPROS data collections

D1B – about 6 answers to methodological questions

The draft working documents under Eurostat guidance should be made available to Eurostat, in principle, eight weeks prior the meeting for comments. Normally Eurostat will provide its comments on the draft versions within two weeks.

As a general rule, the final working documents shall be ready in English at least four weeks before the meeting so that they are made available to the participants for preparation.

The deliverables should be provided in English and in electronic format.

Task 2 – New ESSPROS module on beneficiaries of unemployment social benefits

The aim of this task is to provide support to Eurostat for the development of social protection statistics regarding the number of recipients (beneficiaries) of social benefits. In the perspective of developing official data collections on the number of recipients (beneficiaries) of social benefits (beyond pensions) according to a common methodology, the aim of this task is to provide support to Eurostat for the development of social protection statistics regarding the first priority area, namely social benefits in the unemployment function.

The contractor will be requested to draft the following documents:

For the first contract (9 months):

Report on the possible collection of data for recipients of unemployment benefits in the context of ESSPROS. The report should cover the following aspects:

- 1) Analysis of possible data sources in EU Member States, including timeliness.
- 2) Proposals for a pilot data collection, covering data and metadata structure.

The report should in particular be based on the results of the analysis conducted by the ESSPROS Task Force in November 2018 regarding the methodology and the potential data collection of the number of unemployment beneficiaries. The report should take into account the discussion and conclusions from the Social Protection Working Group meeting of May 2019.

The report should be in English, in electronic format and of around 40-50 pages in length.

For each of the next two renewal contracts (12 months each):

Documents for the ESSPROS Working Group and Task Force on the follow up and developments of the project for the new module on beneficiaries of unemployment benefits. The documents should reflect the most recent state of play of the project, in terms of methodology and results of pilot data collections. They should be based on previous discussions in the Task Force and Working Group and should include proposals for the follow up, including if needed extensions to other types of beneficiaries such as minimum income beneficiaries.

The draft working documents under Eurostat guidance should be made available to Eurostat, in principle, eight weeks prior the meeting for comments. Normally Eurostat will provide its comments on the draft versions within two weeks.

As a general rule, the final working documents shall be ready in English at least four weeks before the meeting so that they are made available to the participants for preparation.

The expected results for task 2 are:

For the first contract (9 months):

D2A: first draft of the Report, 4 months after the start of tasks execution.

D2B: final version of the Report, 6 months after the start of tasks execution. The final version should take into account comment received on the first draft.

For each of the next tworenewal contracts (12 months each):

D2C: about 4 draft and final documents on the project on the number of beneficiaries for the meetings of the Social Protection Working Group and of the ESSPROS Task Force. The draft documents should be made available to Eurostat, in principle, eight weeks prior the meeting for comments. Normally Eurostat will provide its comments on the draft versions within two weeks. As a general rule, the final working documents shall be ready in English at least four weeks before the meeting so that they are made available to the participants for preparation.

The deliverables should be provided in English and in electronic format.

Task 3- Support for meetings

The aim of this task is to provide Eurostat with support for meetings envisaged within 2019, 2020 and 2021, with the participation of the Member states and other countries:

A) Working Group on Social Protection to be held in Luxembourg – up to 2 days most probably during spring of each of the following years: 2019, 2020 and 2021.

B) ESSPROS Task Force on Methodology to be held in in Luxembourg; one and a half day, up to two days most probably during autumn of each of the following years: 2019, 2020 and 2021.

The contractor will be requested, under the direction of Eurostat, to:

- prepare and give presentations (for example power point documents) of items in the agenda of the meeting. Such presentations are based on the documents that are available for each agenda item, including documents prepared by the contractor under tasks 1A and 1B. The length of the presentation is proportional to the complexity of the item, orientatively it can range from 5 to 15 minutes.
- actively participate to the meetings in its role of technical expert: it should give technical advice on the methodological issues raised during the discussion, when requested by Eurostat or in its own initiative.
- prepare the minutes of the meetings.

The expected results of this task are for each contract (1st contract and the 2 renewal contracts):

D3.A – about 10 presentations (in total) for the annual ESSPROS Working Group and Task Force meetings;

D3.B – minutes of the ESSPROS Working Group and Task Force meetings, to be sent to Eurostat 10 days after the event.

The deliverables should be provided in English and in electronic format.

Task 4 – Statistical training for ESSPROS domain

The aim of this task is to provide Eurostat with support for the definition, preparation and implementation of a training course for statisticians in the field of social protection statistics. This course will be then proposed for the inclusion in the ESTP programme. ESTP stands for the European Statistical Training Programme. The purpose of the programme is to provide European statisticians with continuous training in new methods, techniques and best practices and integrate the application of European concepts and definitions. An annual ESTP core programme (catalogue) announcing all courses for the following year is published by Eurostat during the last quarter of the preceding year.

Through a balanced combination of theory and practice and a variety of didactical approaches, such as workshops, group discussions, lectures and exercises, this training intends to provide adequate solutions, including, in some cases, the simulation of real work situations. Training tends to focus on harmonised European concepts and legislation as well as implementation practices at national level. More information on the ESTP can be found from the Eurostat website:

<http://ec.europa.eu/eurostat/web/european-statistical-system/training-programme-estp>

ESTP courses are primarily addressed to officials and employees of National Statistical Institutes (NSI) or corresponding ONAs (Other National Authorities) within the European Statistical System (ESS). Applicants from other administrations, organisations and of non-European countries may be admitted occasionally. These courses may also be used for staff of other Directorates-General (DGs) of the European Commission

All courses are held in English without interpretation. The trainers must be proficient in English. Participants in the training courses are expected to have an adequate knowledge of English to follow the course without interpretation. All course material shall be provided in proficient English.

The duration of a training course can be of one or more days depending on the programme. A course day consists of 8 hours of which a minimum of five hours must be dedicated to teaching/training.

The course programme should cover both theoretical and practical parts. The proposed subjects and experiences may be based on national or international practices. All courses should, however, include the European dimension: this may, e.g. be done by integrating relevant European legislation, making reference to harmonised concepts and definitions at EU level and/or by demonstrating the consequences of different approaches. In addition, selected participants could be contacted in advance to contribute by sharing their national experiences on the specific topic.

The expected results for task 4 are:

D4.1 - In the first 9 months of the project: proposal for a training course, in terms of course description and a draft course programme on social protection statistics, with particular focus on ESSPROS. The contractor should evaluate the possibility to have one course or two courses (basic – advanced) according to the volume and nature of the training proposed. The duration of each course is expected to be between 1 and 3 delivery days.

D4.2 - In the second year of the project: assistance in the drafting of the detailed course programme and the training material for one or two courses, depending on the proposal agreed during the first year. The course programme should indicate details concerning the envisaged time schedule (time dedicated to the individual topics), the teaching/facilitation method, trainers/lecturers involved. This training will be proposed by Eurostat for inclusion in the next annual ESTP programme. In case the training is split in two levels, only the "basic" course will be proposed for inclusion in the ESTP programme for the following year.

D4.3 - In the third year of the project: assistance to Eurostat in the provision of the training course on social protection (ESTP or equivalent). This includes the participation to the course as a trainer for some specific topics of the course programme. The estimated involvement for this training activity is about 6 hours of theoretical and/or practical lessons. The course will be located in Luxembourg.

The deliverables D4.1 and D4.2 should be provided in English and in electronic format.

2.4 Meetings and missions

A one day kick-off meeting will be organised in Luxembourg after the signature of the contract. Each two-three months, progress meetings (maximum 5 per year, including the final meeting) of a maximum half day with Commission staff will be held in Luxembourg, in Commission's premises; if technically possible and suitable according to the content of these meetings, they might be replaced by the video-conferences. For each of the meetings the contractor will prepare the agenda in agreement with Eurostat (who will set the priorities) and will prepare the documents intended to be discussed. The draft methodological documents should be sent to Eurostat at least two weeks in advance. As a general rule, the minutes of each meeting will be prepared by the contractor and sent to Eurostat at the latest 5 days after the meeting for approval.

The final meeting should be foreseen about one month before the end of the contract and it should envisage discussion over the draft final report.

In addition, the contractor should envisage two days for the annual ESSPROS Working Group to be held in Luxembourg and two days for the annual Task Force on Methodology to be held in Luxembourg.

An additional day of mission in Luxembourg should be envisaged for the participation to the training course (see task 4) during the third year of this project only.

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

2.5 Duration and timetable

The contract is expected to be signed in the first quarter of 2019.

Execution of the tasks is to start on 01.04.2019.

The maximal overall duration of the work will be 33 months, divided into an initial contract covering 9 months followed by two 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 one if the Commission decides to sign these following contracts.

The overall indicative timetable is the following:

Time schedule:

	2019			2020				2021			
Task	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
Task 1 - Methodological development of the existing ESSPROS data collections	X D1.A D1.B										
Task 2 - New ESSPROS module on beneficiaries of unemployment social benefits	X	X D2.A	X D2.B	X	X D2.C	X	X D2.C	X	X D2.C	X	X D2.C
Task 3 - Support for meetings	X D3.A D3.B		X D3.A D3.B								
Task 4 - Statistical training	X	X	X D4.1	X	X D4.2			X	X D4.3		

Legend:

- Q – quarter of project lifetime
- x – task's lifetime
- D – deliverables (expected results, see item 2.3 above)

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

2.6 Minimum requirements

Tenders deviating from the requirements or not covering all minimum requirements described below may be rejected on the basis of non-compliance with the tender specifications and will not be further evaluated.

- The final working documents for the ESSPROS Working Group and the Task Force on methodology (see Task 1A and Task 2) shall be ready in English at least four weeks before the respective meetings.

- The draft replies to the methodological questions (see Task 1B) should be sent to Eurostat within maximum 15 working days.
- The proposal and the training material for the course on social protection statistics (see Task 4) should be completed by the first half of the second year of the project.

Furthermore, the tender shall comply with applicable environmental, social and labour legislation established under Union legislation, national legislation, collective agreements or the applicable international social and environmental conventions listed in Annex X to Directive 2014/24/EU¹.

2.7 Technical implementation reports

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

- Six months (four months for the first contract) after the starting date of the execution of the tasks referred to in Article I.3 of the contract, the contractor shall provide, in view of the progress of the tasks referred to in 2.3 of this tender specification and as soon as possible after this date, an interim technical implementation 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 (nine months for the first contract) after the starting date of the execution of the tasks referred to in Article I.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 of this tender specification, a final technical implementation report relating to the execution of the contract describing the results obtained and the means which were implemented for the execution of the contract.

These technical implementation reports shall accompany the corresponding invoice.

2.8 Assessment of results

Evaluation of the results will be based on the following criteria:

Timeliness:

- compliance with deadlines foreseen in the contract
- systematic treatment of the methodological questions (within 5 working days)

Quality

- coherence and analytical quality of the proposed deliverables
- quality of the follow-up of the tasks of the contract and speedy and agile responses to Eurostat instructions

2.9 Specific conditions

- Resources made available by Eurostat

The contractor will have access to all ESSPROS data, except those data which are declared as confidential. Confidential data in ESSPROS being very limited, this condition will not have a significant impact on the quality of the deliverables.

¹ OJ L 94 of 28.03.2014, p. 65

- Specific conditions for the execution of the contract

None.

SECTION 3 INFORMATION ON THE CONTRACT

3.1 General information

The submission of the tender implies acceptance of all the terms and conditions set out in the procurement documents (contract notice, invitation to tender, tender specifications, draft contract) and, where appropriate, waiver of the tenderer's own general or specific terms and conditions. **The submitted tender is binding on the tenderer to whom the contract is awarded for the duration of the contract.**

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

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.

No variants are allowed in relation to the services or the price schedule proposed in accordance with this tender specification

The place of the work will be the Contractor's usual workplace, unless stated otherwise in section 2.9

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.5 and II.21 of the draft contract in Annex 7.

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 the services;
- any person specified in the contract is found by the Commission to be incompetent in discharging or unsuitable for the performance of his/her 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:

https://ec.europa.eu/info/departments/data-protection-officer_en

All personal data may be registered in the Early Detection and Exclusion System (EDES) if you are in one of the situations mentioned in Article 136 of the Financial Regulation². For more information, see the Privacy Statement on

http://ec.europa.eu/budget/explained/management/protecting/protect_en.cfm

3.4.2 Intellectual property rights

Your attention is drawn on Article I.10 of the contract's special conditions which contains specific provisions on intellectual property rights related to the results of the contract and their use.

3.5 E-prior

The execution of the contract between the Commission and the contractors could be automated by the use of the following application: e-Invoicing, e-Catalogue, e-Ordering, e-Request based on an electronic exchange platform (e-Prior). Information on the technical and functional characteristics of the above-mentioned system can be found at:

<https://webgate.ec.europa.eu/fpfis/wikis/x/8pBsAQ>

At the request of the Commission, the use of the above applications could be mandatory for contractors during the lifetime of the contract.

² REGULATION (EU, Euratom) 2018/1046 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L:2018:193:TOC>

The e-Invoicing application may be used for this contract (the decision to use this application can be taken at the start of the contract or during the lifetime of the contract (through an amendment)). Further information on this application are available in the general conditions of the draft contract (Annex 7) in Art II.1 and II.5 and through the link above-mentioned.

If provided for in the special conditions of the contract, the exchange of electronic documents (e-documents) such as invoices between the parties is automated through the use of the *e-PRIOR* platform. This platform provides two possibilities for such exchanges: either through web services (machine-to-machine connection) or through a web application (the *supplier portal*).

Other applications as e-Sourcing and e-Fulfilment, which are currently under development may be implemented on a voluntary basis during the contract execution.

SECTION 4 INFORMATION ON THE TENDER PROCEDURE

4.1 General information

The legal basis for EU procurement consists of the relevant articles of the Financial Regulation, i.e.:

– Financial Regulation - REGULATION (EU, Euratom) 2018/1046 OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012

– Judgments, mainly of the General Court in procurement cases.

The Financial Regulation incorporates the rules from Directive 2014/24/EU³, hereinafter referred to as “the Directive” and Directive 2014/23/EU on concessions⁴.

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 tenders, 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 evaluation 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 group of economic operators if applicable) is open on equal terms to all natural and legal persons coming within the scope of the Treaties, as well as to international organisations.

For British tenderers:

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

³ OJ L 94, 28.03.2014, p. 65, see <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32014L0024&from=EN>

⁴ OJ L 94, 28.03.2014, p. 1, see <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32014L0023&from=EN>

It is also open to all natural and legal persons established in a third country which:

- has a special agreement with the European Union in the field of public procurement on the conditions laid down in that agreement or,
- has ratified the plurilateral Agreement on Government Procurement (GPA) concluded within the World Trade Organisation (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 an tender: either by submitting a joint tender (via a group of economic operators) 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 group of economic operators (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 tender is submitted by a group of economic operators (natural or legal persons). Joint tender may include subcontractors in addition to the members of the group.

In case of joint tender, all members of the group assume joint and several liabilities towards the Contracting Authority for the performance of the contract as a whole, i.e. both financial and operational liability.

Group members in joint tenders may submit only one tender for a single contract. To this end all members of the grouping should sign a power of attorney. This document must be scanned and included in the tender. The tender must indicate which member ("the leader") will represent the group of economic operators in dealing with the Contracting Authority for administrative and financial aspects as well as operational management of the contract. 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.

The Contracting Authority will not request consortia to have a given legal form in order to be allowed to submit a tender, but reserves the right to require a grouping to adopt a given legal form **before the contract is signed** if this change is necessary for proper performance of the contract. This can take the form of an entity with or without legal personality but tendering sufficient protection of the Commission's contractual interests (depending on the Member State concerned, this may be, for example, a consortium or a temporary association).

After the award, the Contracting Authority will sign the contract either with all members of the group, or with the leader on behalf of all members of the group, authorised by the other members via powers of attorney (Annex 4: for groupings not having formed a common legal entity, model 1 should be used, and for groupings with a legal entity in place model 2.)

The documents required and listed in the present specifications must be supplied by every member of the grouping (see 4.4); the checklist in Annex 9 will help verifying the level of information to be provided according to the role of each entity in the tender.

The Tender Report has to be signed by the joint tender leader (hand or electronic signature, as explained in point 5 of the Annex 8 to Tender Specifications: e-Submission application guide).

Partners in a joint tender assume joint and several liability towards the Commission for the performance of the contract as a whole.

Statements, declaring for instance: “that one of the partners of the joint tender will be responsible for part of the contract and another one for the rest”, or “that more than one contract should be signed if the joint tender is successful”, are thus incompatible with the principle of joint and several liability. The Commission will disregard any such statement contained in a joint tender, and reserves the right to reject such tenders without further evaluation, on the grounds that they do not comply with the tendering specifications

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 its contractual obligations to the Commission under the Contract and shall be solely responsible for the performance of the contract (see Article II. 10 of the draft contract in Annex 7).

During contract performance, the change of any subcontractor identified in the tender or additional subcontracting will be subject to prior written approval of the Contracting Authority.

Tenderers are required to identify all subcontractors.

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

4.3 How to send a tender

4.3.1 General Information

If you are interested in this contract, you should submit a tender (see structure below described in item 4.4) for each lot concerned.

Tenders must be submitted exclusively via the electronic submission system (e-Submission) available from the below website⁵. Tenders submitted in any other way (e.g. e-mail or by letter) will be disregarded.

(<https://etendering.ted.europa.eu/cft/cft-display.html?cftId=4194>)

⁵ For detailed instructions on how to submit a tender please consult Annex 8 (e-Submission application guide) in Annexes of the procurement documents and the e-Submission Quick Guide available at: https://webgate.ec.europa.eu/esubmission/assets/documents/manual/quickGuide_en.pdf. In case of technical problems, please contact the e-Submission Helpdesk (see contact details in the Quick Guide) as soon as possible.

In order to submit a tender using e-Submission, tenderers (each member of the group in the case of a joint tender) will need to register in the European Commission's [Participant Register](#) - an online register of organisations participating in EU calls for tenders or proposals. On registering each organisation obtains a Participant Identification Code (PIC, 9-digit number) which acts as its unique identifier in the above register. Instructions on how to create a PIC can be found in the PIC-management [Quick Guide for Economic Operators](#).

Tenderers already registered in the Participant Register shall reuse their existing PICs when preparing tenders in e-Submission.

The time-limit for receipt of tenders is indicated under Heading IV.2.2 of the contract notice where local time shall be understood as local time at the contracting authority's location (the location indicated under Heading I.1 of the contract notice).

The tender must be received no later than 16:00 Luxembourg time on 18/02/2019.

A tender received after the time-limit for receipt of tenders will be rejected. The tender reception confirmation provided by e-Submission with the official date and time of receipt of the tender (timestamp) constitutes proof of compliance with the time-limit for receipt of tenders.

Details on the electronic submission system are provided in section: Annexes of the procurement documents (Annex 8 e-Submission application guide). In order to help tenderers presenting a tender, a checklist of the documents to be submitted in the e-Submission application is provided in annex 9.

All costs incurred for the preparation and submission of tenders are to be borne by the tenderers and will not be reimbursed.

4.3.2 Date and place of opening of the tenders

Tenders will be opened in public at the time and place indicated under Heading IV.2.7 of the contract notice.

Tenders will be opened on 19/02/ 2019 at 10 a.m. at the following address:

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

A maximum of two representatives per tender may attend the opening session. For organisational and security reasons the tenderer must provide the full name, date of birth, nationality and ID or passport number of the representatives⁶ at least two working days in advance to: ESTAT-FINANCIAL-CELL-DIR-F@ec.europa.eu. The representatives will be required to present the tender reception confirmation generated by e-Submission and to sign an attendance sheet. The contracting authority reserves the right to refuse access to its premises if the above information or the tender reception confirmation are not provided as required.

⁶ This data is necessary to ensure access to Commission buildings. Details concerning the processing of personal data for visitors to the European Commission are available in the privacy statement at: https://ec.europa.eu/info/files/data-protection-notice-visitors-european-commission_en

The economic operators who submitted an tender and whose representative was not present at the opening meeting may send an information request to ESTAT-FINANCIAL-CELL-DIR-F@ec.europa.eu. They will be informed per e-mail if their tender was admissible as well as of the identity of the other tenderers.

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 tenders:

- **On the tenderers' initiative:** in order (and only then) to clarify the nature of the contract. Any request for additional information must be made in writing only through the above TED e-Tendering website in the "Questions & answers" tab, by clicking "Create a question" (registration on TED e-Tendering is required to be able to create and submit a question).

(<https://etendering.ted.europa.eu/cft/cft-display.html?cftId=4194>)

- The Contracting Authority is not bound to reply to requests for additional information made less than six working days before the deadline for receipt of tenders. Provided it has been requested in good time, such additional information will be supplied simultaneously to all economic operators through the e-Tendering website (<https://etendering.ted.europa.eu/cft/cft-display.html?cftId=4194>) no later than six days before the deadline for the receipt of tenders.

The website will be updated regularly and it is your responsibility to check for updates and modifications during the submission period.

- **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 e-Tendering website address:

<https://etendering.ted.europa.eu/cft/cft-display.html?cftId=4194>

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, provided this does not lead to substantial changes to the terms of the submitted tender.

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

In exceptional case (unavailability of e-Tendering, other reason...), and under the conditions described above, further information can be obtained by sending an **e-mail or letter** to:

ESTAT FINANCIAL CELL DIR F

For the attention of Eurostat

BECH building - Office D2/720

L-2920 Luxembourg

E-mail: ESTAT-FINANCIAL-CELL-DIR-F@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 as indicated under point IV.2.6 of the contract notice following the closing date for receipt of the tenders. Where the initial contract is stated to be renewable, the tender 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 been altered in the period that has elapsed since the tender in question was submitted, any changes must be reported immediately and at the tenderer's own initiative to the Commission.

4.4 Structure of the tender

Following the structure of the e-Submission application, all tenders must include the following sections:

(1) Parties – information about the parties participating in the procurement procedure, which covers the following items:

a) Identification and information on the composition of the tenderer (section 4.4.1);

b) Information regarding the exclusion and selection criteria (4.4.2 and 4.4.3).

(2) Tender data – you will need to provide the technical tender and the financial tender (financial proposal). (section 4.4.4 and 4.4.5)

(3) Tender report – you will need to provide the signed tender report (4.4.6)

Section	Where to insert in e-Submission
Section 4.4.1 Parties :identification of the tenderer:	<p>"Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'- Legal and regulatory capacity.</p> <p>"Parties" → "Identification of the Tenderer" → "[Party Name]Required field "Declaration on honour"</p>
Section 4.4.2 Parties :identification of the tenderer relating to the exclusion criteria.	<p>"Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'- Exclusion criteria declaration on honour</p>
Section 4.4.3 Parties :identification of the tenderer: Evidence relating to the selection criteria	<p>"Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'- Technical and professional capacity"</p> <p>"Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'-</p>

	Economic and financial capacity"
Section 4.4.4 Technical Tender – Addressing technical specifications and award criteria	" Tender data " → "Add your tender data – Technical tender [name of Call for Tender/ Lot name]"
Section 4.4.5: Financial Tender	" Tender data " → "Add your tender data – Financial tender [name of Call for Tender/ Lot name]"
Section 4.4.6: Tender Report	" Tender report " → "Add your signed tender report

The tender must include all the requested information and be perfectly legible so that there can be no doubt as to words and figures.

The technical tender with page numbering must cover all aspects and tasks required in the technical specifications and provide all the information needed to apply the award criteria.

The tender must include a **cover letter** signed by an authorised representative, presenting the name of the tenderer (including all entities in case of joint tender) and identified subcontractors if applicable, and the name of the single contact point (leader) in relation to this procedure.

Tenders shall include the information and documents requested by the Commission in order to assess the tender. **In order to help tenderers presenting a complete tender, a checklist of the documents to be submitted is provided in annex 9.** This checklist does not need to be included in the tender, but it is encouraged to use it in order to ease the assessment of the tenders

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: Parties :identification of the tenderer

Tenderers may choose between presenting a **joint tender** (see 4.2) and introducing a tender as a **sole economic operator**, in both cases with the possibility of having one or several subcontractors (see 4.2).

Whichever type of tender is chosen, the tender shall stipulate the legal status and role of each legal entity in the tender proposed and the monitoring arrangements that exist between them and, failing this, the arrangement they foresee to establish if they are awarded the contract.

- A. In the e-Submission application, tab "Ways to submit", the tenderers should indicate the organization type (sole tenderer, joint tender involving subpontractors), fill out the required information and additional fields (Identification info, Registration info,), according to the type of tender. The information has to be completed for all entities participating in the tender, including subcontractor.
- B- The following annexes (see below the different cases) shall be duly filled in and signed by a representative of the economic operator authorised to sign contracts with

third parties. It should be uploaded under "Attachments" in the section "Legal and regulatory capacity"

Case 1: Submission by one tenderer

The completed "Administrative information form" (**Annex 1**) accompanied by a legible copy of the **notice of appointment of the persons authorised to represent the tenderer** in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation which applies to the legal entity concerned requires such publication. If they are necessary in order to show the authorisation to represent the tenderer, the instrument of incorporation or constitution of the legal entity and/or a copy of the statutes have to be submitted. If the person(s) signing the tender or the person designated to sign the contract is/are entitled to represent the economic operator by a power of attorney from the abovementioned authorised persons, the power of attorney must also be submitted;

The questionnaire for joint tenders and/or subcontracting signed by a legal representative of the tenderer (**Annex 2**).

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

A letter of availability signed by an authorised representative of the subcontractor stating their willingness to provide the services presented in the tender and in line with the present tender specifications if the tenderer is awarded the contract (**Annex 3**).

Case 3: Submission of joint tender

Each entity involved (all members of the group of economic operators included the lead partner) must provide the completed "Administrative information form" as provided in **Annex 1**.

A letter signed by each member of the group of economic operators, except the lead partner, giving the authorisation to the lead partner to submit the tender on its behalf.

The questionnaire for joint tenders and/or subcontracting signed by a legal representative of the lead partner (**Annex 2**).

After the award of the contract, 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 4**).

In the course of the procedure the EU Validation Services may contact tenderers via the Participant Register and ask for supporting documents with respect to the legal existence (All necessary details and instructions will be provided via the Participant Register). Please note that a request for supporting documents in no way implies that the tenderer has been successful.

The following documents shall not be submitted with the tender in eSubmission but which may be requested by EU Validation Services at a later stage

For the purpose of the LEAR (Legal Entity Appointed Representative) appointment:

- LEAR appointment letter — completed, dated and signed (handwritten blue-ink original signature) by the legal representative and the LEAR

- Declaration of Consent to the Participant Portal Terms & Conditions — completed, dated and signed (handwritten blue-ink original signature) by the legal representative of the organisation
- Copy of the official, valid proof of identity for the legal representative (identity document issued by the national authority containing the photo and signature of the holder, i.e. ID card, passport or driving license)
- Copy of the official, valid proof of identity for the LEAR (identity document issued by the national authority containing the photo and signature of the holder, i.e. ID card, passport or driving licence) and
- Valid official document to demonstrate that the legal representative has the authority to engage the organisation in its entirety.

For the purposes of the legal validation of the entities:

- Signed legal entity identification form⁷ :
 - Natural Person
 - Private Law Body
 - Public Law Body
 - Official VAT document or — if the entity is not registered for VAT — the proof of VAT exemption, not older than 6 months.
 - Signed Financial Identification Form⁸,
 - and the following additional documents, where relevant:

⁷ Available at http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

⁸ http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial-id_en.cfm

Status	Documents to be submitted
Private body (including SME)	Registration extract (not older than 6 months).
Public body	Copy of the act, law, decree or decision that established the organisation as a public body (or, if this doesn't exist, any other official legal document that proves this).
Non-profit organization	<p>Copy of an official document attesting that the organisation has a legal or statutory obligation not to distribute profits to shareholders or individual members.</p> <p>❖ The certificate of tax exemption may only constitute an indication of the non-profit status of the entity which has to be assessed together with other elements.</p>
Research organization	Copy of an official document attesting that one of the main objectives of the entity is carrying out research or technological development.
Secondary or higher education establishment	Copy of an official document attesting that the organisation is recognised such as 'secondary or higher education establishment' by the national education system and is entitled to deliver diplomas recognized by the State.
International organisation International organisation of European interest	Copy of the relevant international treaty creating the organisation under international public law.
Natural person	Copy (legible) of valid identity card or passport.
Entities without legal personality	<p>- Copy of an official document attesting that the representatives of the entity have the capacity to undertake legal obligations on its behalf.</p> <p>- Copy of an official document attesting that the entity has the same operational and financial capacity as that of a legal entity: i.e.</p> <ul style="list-style-type: none"> • a document showing patrimony/asset/capital that is separated and different from those of the members/owners of the entity, and • a copy of the rules providing that creditors can rely on

	this patrimony/asset/capital and — in case of liquidation/insolvency — are reimbursed before the patrimony/asset/capital is divided between the owners/members.
--	---

4.4.2 Section Two: Exclusion criteria

Article 136 of the Financial Regulation⁹ defines situations when the tenderers shall be excluded from participating in procurement procedures.

Declaration:

The tenderer(s) including each partner in case of joint tender and each subcontractor¹⁰ must provide the "Declaration on honour on exclusion criteria and selection criteria" (Annex 5) attesting that they are not in one of the exclusion situations detailed in the Declaration on honour.

The declaration(s) shall be signed by an authorised representative either with advanced electronic signature based on qualified certificates or by scanning and uploading a hand signed copy. The declaration(s) must be uploaded under "'Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments' - Exclusion criteria.

The documents which were signed with an advanced electronic signature based on qualified certificates are *not* required to be sent them by post.

When the declaration(s) on honour and/or the tender report are signed by hand, a scanned copy must be attached to the tender in e-Submission. The hand-signed originals must be sent by letter at the latest on the first working day following the electronic submission of tender. Only the originals of the declaration on honour and the tender report are to be sent by letter, not other documents

(Details on the electronic submission system are provided in annex 8 "e-Submission application guide" point 5).

Evidence:

Only on request of the Contracting Authority, and for contracts with a value higher than EUR 144.000, the successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour (Annex 5) before signature of the contract and within a deadline given by the Contracting Authority. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria. The Contracting Authority reserves the right to require these documents for the other subcontractors.

⁹ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L:2018:193:TOC>

¹⁰ The Contracting Authority shall require that a candidate or tenderer replaces a subcontractor or an entity on whose capacity the candidate or tenderer intends to rely, which is in an exclusion situation.

4.4.3 Section Three: Selection criteria

Tenderers must prove their legal, regulatory, economic, financial, technical and professional capacity to carry out the work subject to this procurement procedure.

The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

The tender must include the proportion of the contract that the tenderer intends to subcontract (see Annex 2).

The tenderer (and each member of the group of economic operators in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with [Commission Recommendation 2003/361/EC](#). This information is used for statistical purposes only.

Declaration:

The tenderers (and each member of the group of economic operators in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the declaration on honour (see Annex 2), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them.

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.

This declaration is part of the declaration used for exclusion criteria (see section 4.4.2) so only one declaration covering both aspects should be provided by each concerned entity.

Evidences:

Tenderers will be required to provide the evidence mentioned below (see 4.4.3 a, 4.4.3 b) in the tender. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria

a- Economic and financial capacity:

Tenderer(s), in case of joint tender each partner, must provide and enclose the full set of annual accounts (balance sheet, profit and loss account and notes on the accounts) for the last two years.

The above annexes shall be uploaded under "'Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'- Economic and financial capacity"

The Contracting Authority reserves the right to ask these documents for the declared subcontractors.

If, for some exceptional reason which the Contracting Authority considers justified, a tenderer is unable to provide one or other of the above documents, it may prove its economic and financial capacity by any other document which the Contracting Authority considers appropriate. In any case, the Contracting Authority must at least be notified of

the exceptional reason and its justification. The Commission reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

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 experiences 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 staffs are currently working for the tenderer on the date of submission of the tender. 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 letter of availability signed by an authorised representative of the subcontractor stating their willingness to provide the services presented in the tender and in line with the present tender specifications if the tenderer is awarded the contract (Annex 3).

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 selection criteria (refer to section 4.5.1 b)).

The above annexes shall be uploaded under "'Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'- Technical and professional capacity"

4.4.4 Section Four: Technical tender

The technical Tender needs to be uploaded in the section "**Tender data**" → "Add your tender data – Technical tender [name of Call for Tender/ Lot name]" in the e-Submission application.

The tenderer must select the "Technical Tender" from the dropdown box ("Financial Tender or Technical Tender"). The e-Submission application allows attachment of as many documents as necessary.

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

Tenders must be clear and concise. Since tenderers will be judged on the content of their written tenders, the tenders must clearly show how the tenderers are able to meet the requirements of the 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).

The technical tender must cover all aspects and tasks required in the technical specifications and provide all the information needed to apply the award criteria.

Tenders deviating from the requirements or not covering all minimum requirements described in section 2 point 2.6 (Technical specifications) may be rejected on the basis of non-compliance with the tender specifications and **will not be evaluated**.

The tender shall comply with applicable environmental, social and labour legislation established under Union legislation, national legislation, collective agreements or the applicable international social and environmental conventions listed in Annex X to Directive 2014/24/EU¹¹.

The Commission envisages applying the EMAS environmental management system ('the EMAS system') provided for by Regulation (EC) No 1221/2009 of the European Parliament and the Council of 25 November 2009 on the voluntary participation by organisations in a Community eco-management and audit scheme (EMAS), repealing Regulation (EC) No 761/2001 and Commission Decisions 2001/681/EC and 2006/193/EC (OJ L 342 of 22.12.2009, p. 1).

During the execution of the contract, the successful tenderer, group member(s) and/or any subcontractor(s), if relevant, may be requested by the Contracting Authority to implement the EMAS scheme, inter alia by providing information relating to the contract field required for the drafting and updating of the documents provided for by Regulation No 1221/2009 and the periodic evaluation of the system.

4.4.5 Section Five: Financial tender

A complete financial proposal (Annex 6), including the breakdown of the price as indicated in the tender specifications needs to be uploaded in section "" **Tender data**" → "Add your tender data – Financial tender [name of Call for Tender/ Lot name]"/ 'Lot name'>" in the e-Submission application. The tenderer will need to select the "Financial Tender" from the dropdown box ("Financial Tender or Technical Tender").

The total price needs also to be encoded directly in the e-Submission application "" **Tender data**" → "Add your tender data <'name of Call for Tender' / 'Lot name'>").

The compulsory reply form (Annex 6) 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).

4.4.6 Section Six: Tender report

Tender report: Consolidation of tender documents

Once all information and documents have been encoded and uploaded in the e-Submission application, and you consider that the tender is complete, the application

¹¹ OJ L 94 of 28.03.2014, p. 65

requires to create the tender report. **This Tender Report will be generated by the e-Submission application.**

This contains the list of documents that you submit. The sole tenderer's or leader's authorised representative(s) must sign the report. The tender report shall be signed by an authorised representative either with advanced electronic signature based on qualified certificates or by scanning and uploading a hand signed copy.

In case of hand-signed copy, you **must send by post all the original documents** that were signed by hand immediately after the electronic submission of your Tender.

In case of a joint tender, the leader must collect all the original declarations signed by hand by the members of the group and send them by post together with the Tender Report, if the latter was also signed by hand. The original documents must be sent to the postal address indicated in the section 5 of Annex 8 "e-submission application guide" , stating the reference to the call for tenders and the Tender ID.

The documents which were signed with an advanced electronic signature based on qualified certificates are *not* required to be sent them by post.

When the declaration(s) on honour and/or the tender report are signed by hand, a scanned copy must be attached to the tender in e-Submission. The hand-signed originals must be sent by letter at the latest on the first working day following the electronic submission of tender. Only the originals of the declaration on honour and the tender report are to be sent by letter, not other documents

(Details on the electronic submission system are provided in annex 8 "e-Submission application guide" point 5).

4.5 Evaluation and award

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

- Verification of non-exclusion of tenderers on the basis of the exclusion criteria
- Selection of tenderers on the basis of selection criteria
- Verification of compliance with the minimum requirements set out in these tender specifications
- Evaluation of tenders on the basis of the award criteria

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

The criteria for choosing the contractor are divided in three categories: exclusion, selection and award. Exclusion and selection criteria are related to the candidate or tenderer, whereas award criteria are related to the tender. Exclusion and selection criteria are verified on a pass/fail basis.

The Contracting Authority will inform candidates and tenderers, simultaneously and individually, by electronic means of decisions reached concerning the outcome of the procedure as soon as possible:

- After the opening phase for tenders received after the deadline or received already open;
- After the award decision, specifying in each case the grounds for the decision.

The information of the successful tenderer does not imply any commitment on the part of the Contracting Authority.

4.5.1 Exclusion and selection of tenderers

The assessment of tenderers will take place in 2 stages:

a- Exclusion of tenderers

Article 136 of the Financial Regulation¹² defines situations when the tenderers shall be excluded from participating in procurement procedures (see Annex 5).

As indicated in point 4.4.2, the tenderer(s) including each partner in case of joint tender and each subcontractor must provide the "Declaration on honour on exclusion criteria and selection criteria" (Annex 5) attesting that they are not in one of the exclusion situations detailed in the Declaration on honour.

Only on request of the Contracting Authority, and for contracts with a value higher than EUR 144.000, the successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour (Annex 5) before signature of the contract and within a deadline given by the Contracting Authority. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria. The Contracting Authority reserves the right to require these documents for the other subcontractors.

The Contracting Authority may waive the obligation of a tenderer to submit the documentary evidence referred to annex 5 in the following cases:

- (a) the candidate is an international organisation or;
- (b) such evidence has already been submitted for the purposes of another procurement procedure in 2017 and provided that the documents are not more than one year old starting from their issuing date and that they are still valid. In such a case, the tenderer shall declare on his honour that the documentary evidence has already been provided in a previous procurement procedure and confirm that no changes in his situation have occurred.

b- Selection criteria

Tenderers must prove their legal, regulatory, economic, financial, technical and professional capacity to carry out the work subject to this procurement procedure.

¹² <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L:2018:193:TOC>

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.

Legal and regulatory capacity

Tenderers must prove that they are allowed to pursue the professional activity necessary to carry out the work subject to this call for tenders. The tenderer (including each member of the group in case of joint tender) and sub-contractors must provide the requested information with the Legal Entity Form (See 4.4.1).

Economic and financial capacity criteria

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

The **economic and financial capacity** of the tenderer will be assessed on the basis of the last annual turnover which has to be at least two times the annual value of the contract to be awarded (equal to the annual value of the financial tender submitted).

In the case of joint tender (group of economic operators) or subcontracting, this turnover criteria shall be assessed in relation to the combined turnover of all the parties involved in the tender.

Tenderers will be required to provide the evidence mentioned above (see 4.4.3 a) in the tender. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria

The Contracting Authority may waive the obligation of a tenderer to submit the documentary evidence referred in point 4.4.3 a) above , if such evidence has already been submitted for the purposes of another procurement procedure in 2017 and that they are still valid. In such a case, the tenderer shall declare on his honour that the documentary evidence has already been provided in a previous procurement procedure and confirm that no changes in his situation have occurred.

All the requirements have to be fulfilled at the deadline for the submission of the tender

- **Technical and professional capacity criteria**

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 (group of economic operators) 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 tenderer must meet the following criteria.

Criteria relating to the team delivering the service

Criterion	Experience in the field of Social Statistics/National Accounts
Minimum requirement	At least one team member with at least three years experience in the field of social statistics. At least one team member with at least three years experience in the field of National Accounts or methodologically equivalent "accounting field" (for example: ESSPROS, SHA). At least one member of the team must have experience in drafting texts on the basis of statistical data (as demonstrated by bibliographical references of 3 published articles or reports) in English.
Documentary evidence	CVs of staff members; 3 published articles or reports in English by providing references to the statistical publications (authors, title, year, number of pages, publisher).

Criterion	Educational and professional Qualification
Minimum requirement	At least 1 team members must have a level of education which corresponds to completed university studies of at least three years attested by a diploma in Economics, Statistics or studies relevant to the field.
Documentary evidence	CVs of staff members

Criterion	Language capabilities
Minimum requirement	At least one person is native English speaker or at least level C1 of the "Common European Framework of Reference for Languages"
Documentary evidence	CVs of staff members

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 (as indicated in section 4.4.3b) and must use the forms provided in the annexes to this document.

Tenderers will be required to provide the evidence mentioned above (see 4.4.3 b) in the tender. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria

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 after the request).

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

All the requirements have to be fulfilled at the deadline for the submission of the tender

4.5.2 Compliance with minimum requirements

Before proceeding to the evaluation of the award criteria, the evaluation committee will assess the compliance of the tender with the minimum requirements contained in section 2 point 2.6 of the present tender specifications.

Furthermore, the tender shall comply with applicable environmental, social and labour legislation established under Union legislation, national legislation, collective agreements or the applicable international social and environmental conventions listed in Annex X to Directive 2014/24/EU¹³.

Tenders deviating from the requirements defined in the tender specifications or not covering all requirements may be excluded on the basis of non-conformity with the tender specifications and will not be evaluated

4.5.3 Award of the contract

a- Evaluation of the technical quality of the tender

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

The technical tender (including any subcontracted parts) must be sufficiently detailed to enable the tender to be assessed on the basis of all award criteria mentioned below. 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 tender is well documented according to the award criteria.

The technical quality of the tender will be assessed on the basis of the following criteria:

1. Technical approach and methodology (60 points)

¹³ OJ L 94 of 28.03.2014, p. 65

This criterion will help assess to which extent the practical implementation and methodology proposed for the project demonstrate efficiency and effectiveness and will be a key success factor for the project and its successful and timely completion.

The technical approach and methodology will be assessed on:

- The extent to which any particularities that are mentioned in the specific project/lot have been considered.
- The practical implementation proposed for the project, for all tasks and expected results to be carried out and how does it demonstrate a solid understanding of all the issues involved.
- Description of the work and the clarity of practical application on how to achieve the project's goals and outputs considering, if possible, examples to demonstrate its successful completion.
- Presentation and description of expected and tangible results to be attained
Description of the **project management methodology** which will be applied to plan, monitor and control the execution of activities.

2. Work plan and timetable - overall planning (10 points)

This criterion will help assess the relevance and quality of the overall planning, of the proposed work plan and of the corresponding dedicated resource and how the project will meet the proposed deadline(s).

The work plan and timetable will be assessed on:

- Detailed work plan and timetable to demonstrate that the project is achievable by the proposed deadline.
- Suitability between the work plan and the intended completion schedule.
- Clear work packages and divided responsibilities and work time amongst team members.
- Detailed implementation of the work plan to demonstrate successful achievement of the expected results, including rapid start-up, milestones and a realistic timeline taking into account the necessary time to involve expected participants and associated stakeholders and reports submitted on time
- Work plan making specific reference to mobilisation of the experts/team, appropriate evaluation points, submission of reports and documents, specific meetings and milestones.

3. Management arrangements - Organization of the work and resources (20 points)

This criterion will help assess the organisation of work, covering both implementation of the contract and how the Contractor will provide support for the management and administration of the contract and contact(s) with Commission services.

The management arrangements - Organization of the work and resources will be assessed on:

- Description of the proposed team (number / profiles) with their role and responsibilities and of the different economic operators (in case of joint tender, including subcontractor if applicable) distributed for each task and work package. Balance between profiles and breakdown of the tasks (which profile is going to do which task and how much time will be devoted to each task per profile).

- Description of how each of the proposed experts will be assigned to the various elements of the work
- Level of details provided on the allocation of time and human resources to the project and each task or deliverables and the rationale behind the choice of the proposed allocation.
- Suitability of the proposed organization for achieving the desired objectives of the project.
- Description given by the tenderer of the part of the project that he/she is able to implement autonomously.
- 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.
- Description of the control the tenderer will exercise over those working on the project and how it will be a success factor for the project.
- Business continuity measures on how the tenderer will assure continuity if staff assigned to the project leave. A description of the back-up system to cover absences of key profiles (project manager, senior expert..)
- Detailed needs and justification for specific technical resources (software, informatics, resources, logistic, etc.).

4. Quality arrangements - Quality control measure (10 points)

This criterion will help assess the overall quality control system of the tenderer and how this will fit Eurostat requirements and help deliver the project in a quality and timely manner.

The quality arrangements - Quality control measure will be assessed on:

- Detailed quality control system applied to the service(s) foreseen in the tender specification concerning the quality of the deliverables and including continuity of the service in case of absence of a member of the team.

b- Method of selecting the economically most advantageous tender

Only tenderers whose tender has scored 50 % for each criterion and minimum 50 points in total or more on the technical evaluation according to the criteria and points set out under [item 4.5.3.a](#) may participate in the evaluation of the financial proposal. The contract will be awarded to the economically most advantageous tender, ie the tender tendering the best price-quality ratio on the basis of the following method:

$$R = \left(\frac{P_{\min}}{P} * 100 \right) * 0.30 + Q * 0.70$$

where:

R	Price-quality ratio
Q	total quality score (out of 100) of tender in question

P _{min}	Cheapest price
P	price of tender in question

The tender ranked first after applying the formula will be awarded the contract.

c- Notification of tenderers of decisions taken by the Contracting Authority

You will be informed of the outcome of this procurement procedure by **e-mail only**. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check this e-mail address regularly.

Eurostat will notify the successful tenderer of the award decision. This notification does not constitute a commitment on the part of Eurostat.

Simultaneously and individually, the Contracting Authority will inform all unsuccessful tenderers, by 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.

Unsuccessful tenderers may request additional information about the reasons for their rejection in writing by mail 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 10 calendar days (“standstill period”). That period shall run from the day after the simultaneous dispatch of the notifications to successful and unsuccessful tenderers. However, if due to technical reasons the dispatch is made on paper, the standstill period is 15 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 or to cancel the procedure.

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.