

OPEN PROCEDURE NO EPSO/EUSA/PO/2018/028

Multiple cascading framework contracts for training services for the staff of the European institutions, offices, other bodies and EU agencies who hold or may be called on to hold managerial posts and for coaching services

Lot 1: Training in managerial skills

ANNEX I : TENDER SPECIFICATIONS

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I. PART I — TECHNICAL SPECIFICATIONS AND MINIMUM REQUIREMENTS

Preliminary remark

The following terms are used for this lot throughout these tender specifications as well as in the financial tender form (Annex 4):

'training' means all forms of learning and development activities, regardless of their mode of delivery (classroom, remote, etc.) with the exception of coaching, as it is defined for lot 2 of this call for tenders;

'coaching' means, when it is used for lot 1, individual face-to-face sessions, telephone or internet sessions, or collective sessions that are an integral part of a training course and are specifically aimed at helping participants integrate in their workplace the lessons learned during a training session;

'tenderer' means the economic operator who chooses to submit a tender;

'successful tenderer' means a tenderer whose tender has been accepted following the call for tenders between the award decision and the moment the contract is signed by the last party;

'contractor' means a successful tenderer who is the signing counterparty of a framework contract;

'institutions' means all the institutions, agencies, and bodies of the European Union, including the European School of Administration and all the organisations to which the School offers its services. A regularly updated list can be consulted under the heading 'institutions' at the following web address: http://europa.eu/about-eu/institutions-bodies/index_en.htm;

'interinstitutional' refers to any item applicable to all the institutions as defined above;

'the School' means the European School of Administration (EUSA) established on 26 January 2005 by decision of the institutions of the European Union. The School is attached administratively to the European Personnel Selection Office (EPSO), which is part of the European Commission;

'Officials' means all the staff of the institutions, whatever their precise status;

'contracting authorities' means the School as the lead body and all the other contracting authorities listed in the contract notice and draft contract;

'Brussels': the territory of Brussels Capital Region, Flemish Brabant and Walloon Brabant;

'Luxembourg': the territory of the Grand-Duchy of Luxembourg.

I.1. INTRODUCTION

The School was set up by the institutions on 26 January 2005 to help them boost their investment in the training and development of their staff, to promote interinstitutional cooperation, the spread of common values, and to develop synergies in the use of human and financial resources.

The framework contracts awarded following Lot 1 of this tender procedure are for the provision of services relating to training programmes aimed primarily at managers but also to those who may be required to take on management duties. These programmes cover both people and team management skills, as well as aspects relating to organisational development. It should be noted that the services in question will be performed partly for the School, whose role is to provide training courses for interinstitutional purposes, and for each of the other contracting authorities for their specific needs.

The institutions have been revamping their competency frameworks to take account of the changing realities of a modern civil service. Many of these competencies are common to all the institutions however, due to their different mandates, there are also others which are specific to an individual institution.

Training programmes sometimes also include some coaching services. Coaching items incorporated in management training programmes therefore also form part of the services to be provided under this lot.

Lot 1 does not include coaching services when they are delivered in a standalone way (i.e. not as a part or as a complement for a training programme).

Institutional background

Like any public administration, the institutions abide by values and principles of good governance such as transparency, financial responsibility, individual and collective responsibility, ethics, respect for diversity and equality of opportunity. They are at the service of the people of Europe and focus on a results-oriented approach. They must use their resources in line with the principles of economy, efficiency and effectiveness.

As regards the use of resources, the institutions operate in an environment largely influenced by economic conditions.

The institutions offer a number of learning opportunities for management staff, although the policy and organisation of this field of activity varies considerably from institution to institution. To this end, some of the institutions have created their own pool of internal trainers. With this in mind it is imperative that there is significant value added from outside trainers.

Since one of the key features of the School is the interinstitutional nature of its activities, it will frequently require training services. The other contracting authorities, on the other hand, will clearly benefit from the existence of a common pool of highly qualified trainers as this will ensure that the standard and type of training offered is the same across all the institutions.

This will help contribute to the creation of a community of managers who have received training that is anchored in the same principles and reflects the same core values. Group coaching sessions are also organised in some of the institutions, and when an interinstitutional aspect is involved, the School may call directly on the contractor's services.

I.2. Subject of the contract

The purpose of Lot 1 is to conclude a multiple cascading framework contract with a maximum of three service providers to ensure the following:

the provision of training services (training design, training delivery and accessory services as described in point 1.3) to develop the managerial skills of staff performing management duties or likely to perform such duties in the future. These services are open to the staff of all contracting authorities.

I.3. Description of services— Minimum technical requirements for Lot 1

I.3.1. General introduction

The contractor will be responsible, in collaboration with the School or the other contracting authorities, for preparing the detailed content of the programmes, providing trainers and coaches, and producing all teaching aids. It will also help evaluate training courses.

At present the School organises training courses at key moments in officials' careers as managers or potential managers. Details of the training courses are shown in Annex 1.

The contractor's main tasks under Lot 1 will be:

- i. to deliver the courses shown in the School's current schedule, attached as Annex 1, as long as they are continued, and to develop new programmes for the School. In particular, this includes blended learning and methods of professional development based on group facilitation,
- ii. to develop and run tailor-made training courses in response to the specific needs of an institution or group of institutions. In particular this includes blended learning and distance/virtual learning,
- iii. to provide a team of quality trainers to deliver these training programmes,
- iv. to proactively monitor the evaluation of the training activities proposed and, in agreement with the contracting authorities concerned, to take any necessary corrective action.

As a general rule, the contractor will perform all these tasks at the demand of and in collaboration with the contracting authorities concerned. The services of developing and facilitating training courses also include providing advice and assistance to improve the quality, relevance or range of the training courses offered.

The contractor will develop the content of the training courses and the teaching methods together with the School or the contracting authorities concerned. Where necessary, it will make proposals to improve quality, in particular in the light of evaluations. Tenderers' attention is drawn to the fact that the contracting authorities may alter the range of training courses they offer in the light of changing needs and/or target groups.

When a training course is designed for an interinstitutional audience, case studies and examples drawn from real working life that may be cited in teaching aids must observe an institutional balance (i.e. not refer to one single institution).

All the provisions of the minimum requirements relating to training design, training delivery, training evaluation and delivery of accessory services apply to relations between the contractor and all contracting authorities.

I.3.2. Nature of the target groups

The target audiences will be management staff, mainly senior and middle managers with some entry and aspirational managers.

Training may also be offered to staff who are not currently in a management position but who wonder whether they have the potential or might like to occupy one.

The level of managerial competence and experience in the target group may range from basic to very substantial. Training needs may vary considerably from one person to another.

The managers in the Institutions are all responsible for managing their staff, and most of them also have budgetary and financial management responsibilities.

In general, managers are subject to mobility; the arrangements vary from one institution to another, but mobility is normally required after about five years in a given post. There are also many possibilities for mobility available to the staff they manage. Mobility from one institution to another is also possible but less frequent.

There are, three major groups of managers:

1. Senior managers (directors-general, deputy directors-general, and directors) have considerable responsibilities in terms of strategic reflection, policy formulation and implementation, and leadership of the managers and staff they are in charge of.
2. Middle managers (heads of unit, heads of division or principal managers) are responsible for managing staff, regardless of which institution they work for. Most of the time they work under the authority of a director, but some may come directly under a director-general.

The size and composition of units vary considerably.

The post of head of unit is very demanding given the great diversity of tasks they have to perform and the fact that they occupy a key position between senior management and their teams.

Most of the heads of unit are directly responsible for the management of the human resources of their units and, in many cases, also for their financial resources. They issue guidelines for policies and actions for their units, on the basis of their mission statements and the priorities they are assigned. They define the unit work programme, coordinate work within the unit and with other units and represent the unit at important meetings. They act also as the main channel for the exchange of information between senior management and the unit's members. In the European External Action Service, the heads of delegations may be senior or middle managers depending on the size and importance of the delegation.

3. Deputy unit heads, heads of sector, project leaders, team leaders, etc.

Regardless of their category (administrator or assistant), these managers may occasionally be required to manage the activities of a substantial number of people, and

although their management responsibilities may not be permanent, that does not rule out the possibility that they may face complex management issues.

I.3.3. Methodology for training programmes

Presentational training courses are, and will remain, at least in the medium term, a major element in the training offered by the School as they allow participants from different institutions to exchange ideas, experience and good practices. They also serve to reinforce the values of the European civil service across the institutions and to promote interinstitutional cooperation by creating new professional networks. It should be noted that coaching, among other training methods, may be incorporated in training courses. Such specific coaching will have to be supplied as part of this lot.

Nevertheless, tenderers must propose other teaching approaches that take account of the different possible ways of learning, the time constraints of participants, and the latest advances in terms of training techniques; these could complement presented training courses.

Computer-assisted training approaches must be practicable in the IT environment of the institutions and compatible with the most common portability and interoperability standards, in particular SCORM (Sharable Content Object Reference Model).

I.3.4. Number of participants and trainers

The average number of participants per course may vary, with an impact on the number of trainers necessary to run a particular programme.

The general rule is that one trainer will be sufficient for a group of up to 16 participants. For bigger groups, or when the nature of the programme justifies it, more than one trainer may be needed.

In any case, the number of trainers needed for a specific activity will be decided by the contracting authorities after consultation of the contractor and taking into account all the relevant elements.

I.3.5. Preparation of training

Following signature of the contract, the contractor will be asked to analyse, jointly with the School:

- whether certain parts of the School's existing programme should be retained as is, or whether there should be minor modifications;
- whether certain parts of the programme can be retained only after a substantial revision;
- whether certain parts of the programme should be abandoned completely;
- what new training courses should be developed.

The contractor will then have to develop, at the demand of and in collaboration with the School, detailed proposals for adapting the existing content and developing new content. This may also apply to the other contracting authorities.

The number of days for preparation required will be determined in the order form following an agreement between the contractor and the School before work on development or modification begins.

I.3.6. Possible adaptation of part or all of a training course

As a result of the ongoing monitoring of all training programmes, or for the preparation of a 'tailor-made' training course, the contractor may be asked to modify the content of the training, the training material and/or its teaching method. The number of days' additional preparation will be defined in advance by agreement with the contracting authorities on an ad hoc basis and payment will be at the rate proposed for training preparation, as proposed in the financial tender form .

Courses may be modified or adapted to obtain short versions of longer courses for specific events. The number of preparation days required for this adaptation will be defined in advance by agreement in writing with the contracting authorities on an ad hoc basis and payment will be at the rate for training preparation, as proposed in the financial tender form.

I.3.7. Development of documentation for participants

Subject to approval of the detailed content of each training course by the School and, where applicable, by the other contracting authorities, the contractor will then have to develop the documentation for participants in English, in French or in both of those languages. This work is included in the price for preparation.

The contractor assumes full responsibility for translation of the material and for the quality of the translation.

The contractor will be required to provide all associated services, in particular the printing and distribution to participants of training material (working documents for participants, summaries, bibliographies, evaluation documents,...).

Paper training material must meet the European Commission's environmental standards (EMAS: Eco-Management and Audit Scheme - http://ec.europa.eu/environment/emas/index_en.htm) and the quality standards and graphic guidelines adopted by the School or the other contracting authorities.

The contractor will also be asked to propose suggested reading, freely accessible online content or any other resource that may help participants to continue their learning on by themselves.

Training material may not show the contractor's name or logo unless it is accompanied by the logo of the School and, where applicable, any institution concerned, together with an indication that the contractor is acting under a contract with the School. The contractor will produce these documents in advance and in sufficient quantities for all course participants to have their own copy.

No document may be used as training material unless it has been validated by the relevant contracting authority. Validation is done via email with the validated document attached. Validation is done separately for each language version of the same document.

To have documents validated, the contractor must send the School the finalised electronic versions at least one month before the planned date for initial distribution (unless a different deadline is agreed). These versions must be compatible with the School's IT tools (Microsoft® Word for Windows®). In the next two weeks the School will then either validate them or give a detailed reason for refusing validation. If validation is refused, the contractor has one week to make the necessary changes.

The delivery of a maximum of twenty copies (30 pages max. in average for each copy) of the training material should be included in the price indicated for training delivery.

Delivering the training material at the place where the training courses are held is the responsibility of the contractor and is also covered in the price of a training day.

The contractor will submit to the School all computer-based teaching material (e-learning, etc.) before it is first used in the form of compressed files compatible with the SCORM standard.

Production of video capsules, if requested will be paid at the specific rate (Price composed of a fixed part per video capsule and a variable part per minute of actual duration of the final product) mentioned in the financial tender form (Annex 4).

I.3.8. Quality of documentation

Validation of documents (point I.3.7) by the School relates solely to their content. The contractor therefore remains responsible for the linguistic quality of the documentation (for example: spelling, grammar, syntax, translation errors, etc.).

If part of the text (including any illustration captions) is omitted or not translated in one of the language versions of the documentation or where material contains manifest errors of spelling, grammar, syntax, or translation (the tolerance in this respect is one error of any kind per ten pages), the School reserves the right to require the contractor in writing (including by e-mail) to replace the material with new corrected copies without delay and at its own expense. If the new copies are not supplied within 5 working days following written request by the School, a claim for liquidated damages will be applied as indicated at article I.15.1 of the framework contract.

I.3.9. Trainer manuals

The contractor must also draw up trainer manuals to ensure that all the trainers giving the same training pursue the same learning goals and use the same material and the same exercises. The manuals must be comprehensive and sufficiently precise to allow new trainers for a programme to master the training rapidly.

The manuals will be drafted in the same languages as the participants manuals (English, French or both of those languages). The trainer manuals must also be validated by the relevant contracting authority following the same procedure as described in point I.3.7.

I.3.10. Quality of the team of trainers

In order to ensure the ongoing quality of its training programmes, the School and/or the other contracting authorities carry out systematic evaluation of the quality of the trainers. At the end of each course organised by the School and/or the other contracting authorities, participants will be requested to give their opinion on a scale of five levels (Entirely agree / Partly agree / Neither agree nor disagree / Partly disagree / Totally disagree) in response to the statement 'The trainer has helped me reach my learning objectives'.

If more than 10 % of the replies received in relation to a particular course during a trimester (or, in cases determined by the School and/or the other contracting authorities, a semester) are of the level 'Partly disagree' or 'Totally disagree', the contractor will be invited to take the appropriate measures to remedy matters. The contractor will inform the School and/or the other contracting authorities of the measures taken.

If the rate of unsatisfactory replies (i.e. the level 'Partly disagree' or 'Totally disagree') remains above 10 % during the following period, the School and/or the other contracting authorities reserve the right to impose for the period in question, and for any subsequent period until the rate drops below 10 %, a reduction of price as foreseen in articles I.15 and II.16.1 in the draft framework contract will be applied.

I.3.11. Quality assurance and monitoring

The contractor must have a system to ensure the quality of training courses, of selection and training of trainers, and of teaching material. The contractor will be required to work in close collaboration with the staff of the contracting authorities for the purposes of evaluating training courses. The contracting authorities have sole responsibility for management of the systems for evaluation by participants, and for exploitation of the results.

At the contractor's request, the contracting authorities will inform it of the results of evaluations solely with a view to receiving proposed adjustments in terms of content, duration, methods and teaching material, etc.

Except for the pilot courses that will be organised systematically for every new training course as well as for courses given jointly with internal trainers, staff from the the contracting authorities' training teams will not normally be present during training courses. However, at the sole discretion of the contracting authorities, and in particular with a view to quality control, staff from the contracting authorities' training teams may attend training courses given, even without giving notice.

All training courses will be given by the same trainer from start to finish unless the course was explicitly designed to be given by different trainers.

The draft framework contract contains special conditions regarding data protection, late delivery, absences of trainers, and training quality in addition to the conditions set out here.

I.3.12. Accessory services

Specific contracts shall be established on the basis of the unit price included in the financial offer (annex 4). However, the contracting authorities may request the contractor to propose supplementary services in complement to those listed in the financial offer (annex 4).

The supplementary elements may not depart from the essential terms fixed in the framework contract and may be requested only if they are absolutely necessary for the execution of the requested services.

Supplementary elements will be ordered on the basis of a quote provided by the contractor, which shall require prior approval by the relevant contracting authority.

They may include, for example:

- Hosting and catering services (conclusions of contracts with hotels, restaurants or other facilities)
- Use of pedagogical tools (personality assessment and other assessment tools, access to external websites)
- Provision of external speakers, high level guests, subject matter experts other than the trainers accredited by the contracting authorities
- Delivery of additional copies of the training material, on top of the 20 copies included in the price (the delivery of a maximum of twenty copies of the training material should be

included in the daily price indicated for training delivery in the financial tender form (Annex 4))

- Supply of books or other supports for the participants to a course
- Renting of any type of device or material
- Translation of documentation in other languages than English or French

I.3.13. Human resources — roles and responsibilities

All the members of the team, as composed by the following profiles, must have the professional capacities set out in point III.2.2-B, depending on the profile.

Project manager

The contractor must designate a project manager (full time), who will be the point of contact with the contracting authorities. The project manager will be responsible, in particular, for determining and coordinating needs and will supervise the organisational and administrative aspects relating to the performance of the contract.

The project manager will also be responsible for communicating information between the contracting authorities and the trainers. For urgent issues the contracting authorities have to be able to contact the trainers directly.

The project manager must send, each time it is requested and at least once every quarter, a financial and operational report on the use made of the contract to the School and each of the contracting authorities. This report should include all orders to date (showing type of course, target audience, initial amount, final amounts actually invoiced per order, per quarter and cumulatively from the start of the contract, by contracting authority).

If the contractor intends to replace the project manager, it must first obtain the agreement of the School before appointing the replacement.

Pedagogical manager (design and development)

For the purpose of preparing training programmes, the contractor must designate a pedagogical manager (full time) who will coordinate and take primary responsibility for the entire design and development of the training courses and for initial revision of the existing courses and any adaptation of them. After each training course, the pedagogical manager will also be responsible for collecting from trainers any information that may be useful on how the training went. This information will be passed on in writing to the contracting authority concerned.

If the contractor intends to replace the pedagogical manager, it must first obtain the agreement of the School appointing the replacement.

The pedagogical manager cannot be the same person as the project manager

Contract management team

In addition to the project manager and the pedagogical manager, the contractor should work with a team of at least 2 persons working full time (or a larger team representing a minimum of 2 full time equivalent) in charge of managing the contract (follow up of orders, invoices, evaluations, etc.).

Replacement of project manager or pedagogical manager.

As the qualifications and language skills of the project manager and pedagogical manager, as described in point III.2.2-B, are essential selection conditions, the contractor must first obtain the agreement of the School if they intend to replace them. This agreement is not needed for other members of the team, as long as they satisfy the linguistic criteria.

I.3.14. Accreditation of Trainers

Trainers can be members of the permanent team of the contractor or freelance subcontractors. The conditions for their selection and accreditation are described below.

The trainers proposed after signature of the contract must have a good awareness of the activities, culture of the institutions and experience of working in a public service and with a diversity of cultures in an international context.

They must also possess a high level of competence in the field of training in general and, where appropriate, in the field of the training courses they are asked to deliver.

Since the training courses are given in English and in French, the contractor must be able to provide trainers sufficiently competent in those languages. The contractor must therefore propose trainers with a command of one of these languages that is close to that of a native speaker (at least level C1 of the 'Common European Framework of Reference for Languages') http://www.coe.int/t/dg4/linguistic/cadre1_EN.asp). http://www.coe.int/t/dg4/linguistic/cadre1_FR.asp

When performing the contract, the contractor must obtain accreditation from the School for all their trainers. Accreditation will be based on the curriculum vitae, an interview and a practical test to verify if the trainer proposed meets the requirements set out in the specifications.

The School will not pay nor refund any costs incurred for this accreditation procedure.

In the event of a refusal to grant accreditation, the contractor may repeat the accreditation procedure, either with the same trainer or another trainer with the required profile.

The School may request the replacement of any individual trainer without giving notice, if she/he does not satisfy the requirements set out in the specifications or the general and special conditions of the framework contract.

I.3.15. Trainers' responsibilities

In the training approaches used, in their attitude, and the content of the services provided, the trainers must respect and promote the values of the European civil service, in particular equality, dignity, solidarity, justice and respect for rights and freedoms. In this regard, ethics, both personal and professional, will play an important role. Tenderers must also be aware that the institutions practise and apply a policy of equal opportunities and promotion of diversity and they must take account of this both in their bids and, where relevant, during performance of the contract.

Trainers must possess the highest ethical standards and professional competence and must abide by any code of conduct or similar rules in force in their company or any professional body to which they belong.

The minimum services required of trainers include the following:

- preparing the training course properly and in good time;
- conforming to the standard programme developed for the course to be given;
- being capable of using the technology provided properly;
- being present at least 30 minutes before the start of the course;
- explaining the learning objectives clearly to participants at the beginning of the course;
- running the course in such a way as to maximise the chances that all participants will achieve their learning objectives, in particular by drawing parallels with the participants’ specific working environments;
- answering participants’ questions clearly and precisely;
- informing the staff of the School and/or the other contracting authorities without delay of any logistical problems (defective equipment, missing manuals, etc.);
- remaining attentive to participants’ needs and transmitting to the School and/or the other contracting authorities, through the pedagogical manager, any suggestions for modifying or improving the training course;
- relaying through the same channels any incident that may occur during a training course;
- switching off the electronic equipment provided (video projectors, computers, etc.) at the end of each training day and doing the necessary at the end of their course to return the classroom to its original layout.

Trainers should also be able to deliver distant training (webinars) and to use (or be ready to learn how to use) the softwares and IT tools used for this.

I.4. DELIVERABLES AND TIMETABLE

In general, the School plans its programme of courses twice a year for the following semester. It starts its planning exercise for the 1st semester of the year in September of the previous year and all planning should be finalised by the beginning of November of that year, so as to be published for the Institutions. The planning for the 2nd semester begins in March of the same year so as to be finalised by mid May. The contractor must respect the planning schedule and ensure that a sufficient number of staff are available for the planning process. Once the planning has been arranged it should not be subject to change.

Outside this major planning exercise, there may be extra courses and services requested where need arises.

The contracting authorities tend to order their courses as and when they are required.

A quarterly report, in the form of a spreadsheet (compatible with Microsoft Excel ®) must be provided to the School and each contracting authority. This report must show, for each contracting authority, how much has been ordered to date (by purchase order), how much has been invoiced (by purchase order), which purchase orders have been fully billed and are to be closed, the balance to be paid. The School must receive the same report and, as the lead contracting authority, an overall report which includes all the information for all the contracting authorities.

Together with these reports, the contractor should send to the School the complete set of the documentation and material they have produced for all contracting authorities (participants manuals, trainers guides, slideshows, videos, etc.). This material will be put at the disposal of all the contracting authorities by the School in a common repository. The material should be sent in a format compatible with the most common softwares used in the Institutions, i.e MS Word (formats doc or rtf) AND Adobe Acrobat Reader (pdf) for written documents and for videos, the formats mp4, flv, mov or wmv.

All the reports and their attachments should be sent by email at the latest one month after the end of each quarter (i.e. on 30/4 for the 1st quarter, on 31/7 for the 2nd quarter; on 31 October for the 3rd quarter and on 31st January for the 4th quarter).

In case of delay in the delivery of these reports or of incompleteness of the content, the contracting authorities may apply the liquidated damages and/or price reductions foreseen in the draft framework contract (articles II.15 and II.16).

The contracting authorities may also suspend the payment according to articles I.6.3 and II.21.7 of the draft framework contract.

I.5. MEETINGS

Management and coordination meetings

The School or any other of the contracting authorities may organise meetings in Brussels with the project manager and/or the pedagogical manager, with the purpose of discussing administrative (ordering, invoicing, etc.) or training related (evaluation of trainers, training, exchange of concerns or informations related to coaching) matters.

The rate proposed for training delivery in the financial tender form (Annex 4) should include 10 meetings of this kind with the School per year.

Any supplementary meeting or meeting with other contracting authorities and at their request will be paid at the rate mentioned for training delivery in the financial tender form per person explicitly mentioned on the purchase order. No payment will be made for meetings if they are not explicitly requested in a purchase order.

The minutes of the meetings will be drafted by the Contractor and sent, within 15 calendar days, to the other party for approval.

Trainers meetings

Trainers may also be asked to attend specific training or briefing sessions organised by the School or the other contracting authorities, in particular to ensure that their services are better adapted to the specific context of the European institutions.

Participation to such sessions will be paid at the rate foreseen for training delivery, as proposed in the financial tender form (including for the project manager, the pedagogical manager and other members of the management teams who have been explicitly invited).

Travel, accommodation and subsistence expenses will be reimbursed only if the session is organised outside of Brussels or Luxembourg or/and in accordance with the terms of the contract.

Meetings at the request of the contractor

The contractor may request meetings with the School or other contracting authorities (for example to propose services or promote new approaches they would like to implement). No payment will be made for those types of meetings.

I.6. PLACES OF PERFORMANCE

The services concerned by this call for tender will be performed mainly in Brussels and Luxembourg.

The training courses will be given mainly in Brussels and Luxembourg, and to a lesser extent at distance (webinars) or in other places in the European Union. They will generally be organised on the premises of the School, on the premises of the contracting authorities or in outside training rooms made available by the contracting authorities.

Travel and subsistence expenses for training courses given outside Brussels or Luxembourg, will be reimbursed in accordance with the terms of the framework contract. No other costs will be reimbursed.

Travel, accommodation and subsistence will NEVER be reimbursed for training in Brussels or Luxembourg, except in the specific case mentioned at point II.7.1. Those costs should therefore be included in the daily rate proposed in the financial tender form.

Travel, accommodation and subsistence will also NEVER be reimbursed for training delivered by phone or other equivalent telecommunication tool.

The price proposed for training delivery in Brussels will also be applied for distant training (webinars, etc.).

For distant training or coaching as well as for face-to-face training or coaching, the individual equipment needed by coaches (PC or laptop, software, phone, etc.) will NEVER be reimbursed by the contracting authorities, neither the costs for the use of it. The cost of any such individual equipment must therefore be included in the daily rates mentioned in the financial tender form.

Rooms, furniture and room equipment (flip charts, etc.) needed for coaching will normally be provided by the contracting authorities.

Tenderers should ensure that they can provide a sufficient number of trainers to deliver courses outside of Brussels or Luxembourg.

Any special material or equipment needed for the training will be provided by the contracting authorities except for individual equipment needed by trainers. The cost of any such individual equipment must be included in its price.

The Contractor shall comply with the obligations of each contracting authority concerning the authorisation of access to their premises (see for example Article I.14 of the draft framework contract for the Commission buildings in Brussels.)

I.7. WORK SCHEDULES

The contractor will be required to provide services on all working days of the contracting authority, which may include national public holidays and, occasionally, evenings and/or weekends. For the purposes of this contract, each contracting authority will communicate its yearly calendar of holidays after the signature of the contract.

I.8. LANGUAGE OF SERVICES

The training services will be performed in English (approximately 65 to 80 %), French (approximately 10 to 15 %) or both languages together (approximately 10 to 20 %).

All correspondence and reports must be in English and/or French

I.9. VOLUME OF SERVICES

Based on annual estimates, the total volume of services to be provided under the framework contract is as described in the financial form (Annex 4).

However, these estimates do not constitute any obligation on the volume to be purchased and are given for information purposes only and without any commitment.

The contracting authority may use a negotiated procedure without prior publication of a contract notice for the award of new services consisting of the repetition of similar services entrusted to the economic operator awarded the initial contract by the same contracting authority. It is possible to use this procedure only during the performance of the initial contract and during a maximum period of three years after its signature.

I.10. INTELLECTUAL PROPERTY

The applicable provisions on intellectual property are set out in Article II.13 of the draft framework contract.

I.11. COMPLIANCE WITH ENVIRONMENTAL, SOCIAL AND LABOUR LAW

The contractor must respect the applicable obligations under environmental, social and labour law established by Union law, national law, collective agreements or by the international environmental, social and labour law provisions listed in Annex X to Directive 2014/24/EU.¹

II. PART II — ADMINISTRATIVE SPECIFICATIONS

II.1. PARTICIPATION IN THE CALL FOR TENDER PROCEDURE

Participation in this call for tender procedure is open on equal terms to all natural and legal persons coming within the scope of the Treaties and to all natural and legal persons established in a third country which has concluded a special agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Where the Multilateral Agreement on Government Procurement concluded within the framework of the World Trade Organisation is applicable, participation in the procurement procedure shall also be open to all natural and legal persons established in the states which have ratified this agreement, under the conditions laid down therein.

II.2. PARTICIPATION IN ONE OR MORE LOTS

Tenderers may participate in one or more lots subject of the present procedure.

¹ Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2004/18/EC (Text with EEA relevance) (OJ L 94, 28.3.2014, p. 65-242).

II.3. VARIANTS

Variants, any equivalent alternatives to the model solution of the contracting authority, are prohibited.

In addition, tenderers may not submit tenders for only part of the services required.

II.4. JOINT TENDERS

A group of two or more economic operators may submit a tender (joint tender). A joint tender will be treated in the same way as any other type of tender, being assessed on its own merits in the light of the criteria set out in these specifications. A joint tender may include sub-contractors, in addition to the joint tenderers.

Any change in the composition of the group during the procurement procedure may lead to rejection of the tender. Any change in the composition of the group after the contract has been signed, may result in the contract being terminated.

Each member of the group must be identified in e-Submission. The group must clearly indicate the separation of tasks among the members (Annex 2). The group shall appoint (through a power of attorney signed by each member) a legal entity (“leader”) with full authority to bind the group and each of its members vis-a-vis the Contracting Authority for submission of a tender and the signing of the contract.

Following the award, the contract will be signed between the contracting authority and the ‘leader’.

The duly authorised ‘leader’ will be also responsible for administration of the contract (order forms, invoicing, receiving payments, etc.) on behalf of other members of the group.

In the case of a joint tender, all the members of the group are jointly and severally liable for the performance of the contract.

Exclusion criteria (see point III.1 below) will be assessed in relation to each member of the group individually. Selection criteria (see points III.2 below) will be assessed in relation to the group as a whole.

II.5. SUBCONTRACTING

Subcontracting is permitted but the contractor shall retain full liability towards the contracting authority for performance of the contract as a whole.

Tenderers must indicate clearly in their tenders the percentage of the total value of the contract which will be subcontracted (Annex 2).

Only subcontractors who will perform more than 10% of the total value of the contract will have to be identified in e-Submission. The activities and the estimated volume of the participation of these subcontractors must be included in the tender (Annex 2).

Each subcontractor must provide also a declaration/letter of intent confirming its unambiguous undertaking to collaborate with the tenderer if they are awarded the contract and detailing the resources that they will put at the tenderer’s disposal for the performance of the contract.

All subcontracting must be approved by the contracting authority, either by accepting the tender, or, if proposed by the Contractor after Framework Contract signature, by prior agreement of the contracting authority. In the latter case, the modification may be accepted only in exceptional circumstances when the contracting authority considers sub-contracting to be necessary to complete the project and when it does not lead to distortion of competition.

II.6. NATURE OF THE CONTRACTS

A “multiple framework contract in cascade” will be concluded with a maximum of 3 service providers by lot, provided that there is a sufficient number of acceptable tenders.

By “multiple framework contract in cascade” is meant a situation whereby a framework contract is concluded separately, but in identical terms, between the contracting authority and several service providers, to ensure that a contract can be performed in succession by one or the other of the contractors following the descending order established in the award.

This is an interinstitutional framework contract. The lead contracting authority acts on its own behalf and on the behalf of the bodies listed as contracting authorities in the contract notice and in the draft framework contract.

The lead contracting authority shall sign the framework contract and any amendments related thereto on its own behalf and on behalf of all the other contracting authorities which provided the lead contracting authority with a power of attorney to this end. For more details on the interinstitutional nature of the contract, please refer to Article I.13 of the draft framework contract.

II.7. ORDER FORMS

II.7.1. Order forms

Every service to be provided under the framework contract must be covered by an order form prepared in advance by the department designated by the contracting authority. No service can be provided without such order form. The template of the order form used is annexed to the draft framework contract.

Orders must specify the terms of performance including, in particular, the references of the framework contract, the type of service (e.g. delivery of standard training, design and preparation of tailor-made training, etc.), a detailed description of the service(s), the amount in euros, the language(s) to be used for performance, performance dates where applicable, the name of the trainers where applicable, the place where the service is to be provided, the name of the official responsible for administering the order, the target audience, etc.

Training preparation, training delivery and production of video capsules will be ordered in the conditions mentioned in the price schedule.

In case a trainer would be requested to deliver training during an evening, this delivery will be paid a half-day for a duration of work that will never exceed 3 hours. Exceptionnaly, when an evening course is delivered in Brussels or Luxembourg and if the trainer is explicitly requested to stay in a hotel or another place for pedagogical reasons, the accommodation and restaurant cost will be reimbursed at cost price in accordance with the terms of the framework contract.

Individual face-to-face coaching sessions of an average duration of 1.5 hours, as follow up or preparation for a course, will be paid at half the rate foreseen in the price schedule for a half-day training delivery.

A phone or an internet session of a duration of 30 minutes maximum, as follow up or preparation for a course, will be paid at the rate of 1/12 of the lowest price foreseen for a day of training delivery in the price schedule. All period of 30 minutes started will be taken into account for this payment.

II.7.2. Order periods

The purchase orders will be issued according to the needs of each contracting authority and without any particular periodicity.

However, some contracting authorities with larger needs will issue these purchase orders in a grouped manner (purchase orders for several dozen courses to be distributed over several months), 2 to 4 times a year.

Where an order specifies the dates of performance of the service, the earliest such date shall not fall less than ten working days after the date when the purchase order is sent to the contractor, except with the contractor's agreement.

If the dates for performing the services are not indicated on the order form, they must be agreed in writing between the contractor and the contracting authority concerned.

II.7.3. Cancellation of orders

The contracting authority may cancel any service ordered without incurring any cost, up to ten working days before performance of the service starts. Where the contracting authority cancels a service less than ten working days before it is due to begin, it shall be required to pay the contractor the amount due for the cancelled service.

If a training course outside of Brussels or Luxembourg is cancelled and the transport tickets (plane, train or other transportation means) cannot be cancelled or can be cancelled only with a penalty, the contracting authority will however reimburse the costs for these tickets or, where appropriate, the penalty in the same conditions as if the training session would have been delivered.

II.8. TERMS OF PAYMENT

The payment arrangements are laid down in the draft framework contract for services (Article I.6).

In addition, payments under the contract will be made monthly on receipt of the invoices and all supporting documents, in accordance with the arrangements set out in the contract.

Invoices should mention the reference of the related purchase order and be accompanied by any relevant supporting documents proving that the training sessions have effectively been delivered. These supporting documents will be as described in the purchase order. If nothing specific is mentioned in the purchase order the supporting document will be a list of participants for each of the training sessions delivered during the invoicing period, with the signature of the participants and the trainer.

III. PART III — EVALUATION OF THE TENDERS AND AWARD OF THE CONTRACT

EVALUATION STEPS

The evaluation will be based solely on the information provided by the tenderer in the offer. It is conducted in three stages in no predefined order:

- Verification of non-exclusion of tenderers on the basis of the declaration on honour on exclusion criteria;
- Selection of tenderers on the basis of the verification of the declaration on honour on selection criteria and the requested supporting documents;
- Evaluation of tenders in the light of the award criteria mentioned in point III.3.1.

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 and status and economic and financial capacity. Please note that a request for supporting documents in no way implies that the tenderer has been successful.

III.1. EXCLUSION CRITERIA

Tenderers must provide a declaration on their honour, dated and signed by a duly authorised legal representative, stating that they are not in one of the situations referred to in Articles 136 to 141 of Financial Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 repealing Regulation (EU, Euratom) No 966/2012 (hereinafter “the Financial Regulation”).² The declaration on honour is included in the Annex 3.

In the event of a joint tender, the declaration — dated and signed by a duly authorised legal representative must be submitted by each member of the group.

In case of subcontracting where the proportion of the contract to be performed by the subcontractor exceeds the threshold of 10 % of the value of the framework contract, the declaration — dated and signed by a duly authorised legal representative must be submitted by each subcontractor.

The exclusion criteria will be applied to each member of the group and each subcontractor concerned.

In accordance with Article 137 of the Financial Regulation and point 18.1 of its Annex I, the successful tenderer(s) will be asked to submit evidence as defined in the declaration, before the signature of the framework contract and within a deadline given by the contracting authority.

The successful tenderer(s), referred as “the person” here below and in the declaration, must submit:

For situations described in (a), (c), (d), (f), (g) and (h),

- production of a recent extract from the judicial record is required or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of establishment of the person showing that those requirements are satisfied.

² OJ L 193, 30.07.2018, p. 1.

For the situation described in point (b),

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

If the person has already submitted such documents for the purposes of another procurement procedure and provided that the issuing date of the documents does not exceed one year and that they are still valid, the person shall declare on his honour that the documentary evidence has already been supplied and that no change in his situation has occurred. In this case, it shall indicate the reference of that procedure.

If the tenderer is unable to provide the documents requested within the period specified by the contracting authority and cannot therefore prove that he is not in one of the situations of exclusion, the tender may be rejected and the contracting authority reserves the right to sign the contract with another tenderer.

III.2. SELECTION CRITERIA

Tenderers must demonstrate that they have the economic, financial, technical and professional resources to perform the contract.

Offers from tenderers who do not meet the selection criteria will not be taken into account for the award criteria.

Please note that the supporting documents listed below must be provided with the tender as proof of the declaration on the honour on the selection criteria referred to in the Annex 3.

III.2.1. ECONOMIC AND FINANCIAL CAPACITY

The tenderer must demonstrate sufficient economic and financial resources to perform the contract by complying with the following criterion/criteria:

- (1) When submitting a tender only for Lot 1 (management training), the tenderer must demonstrate an average annual turnover exceeding EUR 500,000 for the 3 last financial years closed.

When submitting a tender for both Lot 1 (management training) and Lot 2 (coaching for managers), the tenderer must demonstrate an average annual turnover exceeding EUR 1,000,000 for the 3 last financial years closed.

In case of a joint tender, this criterion applies to the combined capacity of all members of the group.

Supporting documents:

- a statement of the annual turnover for each of the last 3 financial years closed. The contracting authority reserves the right to request any other document enabling it to verify the economic and financial capacity of the tenderer.

In the case of a group, each member will have to provide the information required above. In the case of subcontractors performing a share of the contract representing more than 10 % of the total value of the Framework Contract, the information requested above must be provided separately for each subcontractor.

In addition, in the case of a group and/or subcontracting, a consolidated document summarising the information must be provided. In this regard, the combined capacity of all members of the group and/or subcontractors identified, considered as a whole, will be taken into account.

III.2.2. TECHNICAL AND PROFESSIONAL CAPACITY

Tenderers' technical and professional capacity for providing the services described in these specifications will be assessed with regards to their know-how, experience and reliability.

Tenderers must demonstrate that they have sufficient technical and professional capacity to perform the contract by complying with the following criteria. In the case of a group, each member will have to provide the information required below according to their role in the group. In the case of subcontractors performing a share of the contract representing more than 10 % of the total value of the Framework Contract, the information requested below must be provided separately for each subcontractor according to their role.

A — TENDERER'S EXPERIENCE IN THE FIELD OF THE CONTRACT

The tenderer must demonstrate their experience in the field of the contract by having delivered an average of at least 50 days of training for managers for **each** of the past three years.

Out of these 50 days, the tenderer should have delivered at least each year :

- an annual average of at least 15 days to senior managers (directors or directors general or equivalent in companies or institutions of more than 1000 people)
- an annual average of 15 days (not necessarily the same than for the previous point) to managers working in an international and culturally diverse context
- an annual average of 15 days (not necessarily the same than for the previous points) to managers working in civil service

To this end, the tenderer must complete and submit Annex 5, consisting of a list showing that they have provided training services for managers in the last 3 years in an international and culturally diverse context, i.e. a context where the diversity has a daily impact on interpersonal relations. Tenderers' attention is drawn to the fact that it is the actual context where the training is delivered which will be taken into account and not the multicultural or international nature of the organisation.

Production of videos or other supports will not be taken into account for the assessment of this point. Only training delivered physically or remotely in front of a group of participant will be taken into account.

For each course or training assignment, the list in Annex 5 should indicate:

- the name and address of the company or institution for which the training has been delivered
- the level of responsibility of the persons being trained
- the general topic of the training,
- the duration in days of the training courses delivered (if a course goes over more than one single calendar year, a breakdown of these day per year is also needed; only periods of at least 2 hours of course delivery can be accounted for a half day and periods of at least 5 hours of delivery can be accounted for one day).
- a justification that the context was international and culturally diverse.

B — CAPACITY OF THE TEAM PROPOSED BY THE TENDERER

The tenderer must have the following team at its disposal:

1. A project manager who:

- has at least 5 years' professional experience in organising and managing training delivery over the past 10 years
- has a sufficient command of both English and French (corresponding to at least level C1 for reading, listening, speaking and writing in one of those languages and at least level B2 in the other one, according to the levels described in the 'Common European Framework of Reference for Languages' (CEFR) of the Council of Europe: <http://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr>)

To this end, the tenderer must submit a completed CV for the designated project manager.

2. A pedagogical manager who:

- has at least 5 years' professional experience in managing the design of training activities and the development of trainers professional skills over the past 10 years
- has a sufficient command of both English and French (corresponding to at least level C1 for reading, listening, speaking and writing in one of those languages and at least level B2 in the other one, according to the levels described in the 'Common European Framework of Reference for Languages' (CEFR) of the Council of Europe : <http://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr>.)

To this end, the tenderer must submit a completed CV for the designated pedagogical manager.

3. A project management team, consisting of at least two other persons who both which :

- have a sufficient command of English (corresponding to at least level C1 for reading, listening, speaking and writing, according to the levels described in the 'Common European Framework of Reference for Languages' (CEFR) of the Council of Europe : <http://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr>.)

To this end, the tenderer must submit completed CV's for at least 2 other members of the project management team.

For the purposes of this call for tenders, tenderers must use the standard Europass format for curricula vitae, which is available for download at: <http://europass.cedefop.europa.eu/en/home>

Tenderers must pay particular attention to the denominations of the linguistic competences based on the 'Common European Framework of Reference for Languages' (CEFR) of the Council of Europe : <http://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr>.

III.3. EVALUATION OF THE TENDER

The evaluation committee will verify the conformity of the technical offer with the minimum requirements laid down in the technical specifications (point I.3 — List of minimum required mandatory technical requirements).

Tenders that deviate from the requirements laid down in these specifications or not covering all requirements may be excluded on the basis of non-conformity with the tender specifications and will not be evaluated.

Any compliant tender will be assessed on the basis of the award method detailed below.

III.3.1. AWARD CRITERIA

The contract will be awarded to the economically most advantageous tender, on the basis of:

- the quality of the services offered, assessed in the light of the award criteria set out below, and
- of the financial offer.

The weighting between the quality of the proposed services and the price offered is:

70% — quality of services

30% — price offered

III.3.2. EVALUATION OF QUALITY

A maximum of 200 points will be awarded for the **quality** of the tender. The overall quality of each tender shall be evaluated on the basis of the following criteria:

Criterion 1 : Quality of the proposal of a programme for long-standing directors on strategy and vision.

A maximum of 40 points can be attributed to this criterion (minimum threshold 28 points)

The tenderer must submit a document of no more than 6 pages (font: Arial 12 pt) containing proposals for a programme on strategy and vision for directors who have been several years in their post.

These proposals should include an assessment of what they can do and how far they can be pushed, describing the objectives, methodology, and the different types of learning that would

challenge them and expand their horizons whilst at the same time respecting their time constraints.

The document will also indicate precisely how the proposal is geared to the specific context of the institutions and the precise audience it is aimed at.

It will also include a description of the way the tenderer would choose and prepare the people (trainers, etc.) in charge for the delivery of this programme, including all relevant details about what is expected concerning their profile, experience, other characteristics, etc (e.g. this could take the form of a brief biography of some of the intended trainers).

The above criterion will be assessed based on the following aspects:

- The concrete answers given by the tenderer to the issues to consider when designing and conducting programmes for this population, in the light of their specific working context (8 points).

The following questions will be taken into account for the evaluation of this point:

- How does the programme capture the participants' attention and lift obstacles to their participation and engagement?
- How does the programme keep the focus on the most important areas of development for the participants (where the benefit is for them and for the institutions), considering their specific working context?
- The relevance and quality of the programme designed by the tenderer regarding the needs and expectations of the participants and institutions (24 points).

The following questions will be taken into account for the evaluation of this point:

- How relevant are the topic(s) developed in the programme for the participants (taking into account the level at which they are addressed?)
- How clear and concrete are the objectives described for the programme and how coherent is the programme with those objectives?
- How challenging and pushing is the programme (bringing the participants outside of their habits or usual patterns)?
- How innovative is the programme in regard of methods and approaches?
- How does the programme open new perspectives for the participants and possibilities for their further development?
- What does the tenderer proposes in terms of evaluation of the impact of the programme?
- the tenderer's proposal to ensure that the programme will be delivered by people with the right professional and personal characteristics (8 points).

The following questions will be taken into account for the evaluation of this point:

- How does the tenderer ensure that the programme will be delivered by people who have the needed understanding of the topic and practical experience of it?

- How does the tenderer ensure that the programme will be delivered by people who have the right approach and attitude for working in an effective way with the target audience?

Criterion 2 : Quality of the proposal of a programme for managing performance.

A maximum of 40 points can be attributed to this criterion (minimum threshold 28 points)

The tenderer must submit a document of no more than 6 pages (font Arial 12pt) describing a programme on performance management for all managers. The document should explain clearly the objectives, methodology, and the proposed content. The programme should include content related to the management of underperformance. The document will also indicate precisely how the proposal is geared to the specific context of the institutions. The programme should take into account the problems managers encounter in this context and the competencies needed to overcome those problems.

The above criterion will be assessed based on the following aspects:

- The concrete answers given by the tenderer to the issues to consider when designing and conducting programmes for this population, in the light of their specific working context (12 points).

The following questions will be taken into account for the evaluation of this point:

- How does the programme capture the participants' attention and lift obstacles to their participation and engagement?
- How does the programme keep the focus on the most important areas of development for the participants (where the benefit is for them and for the institutions), considering their specific working context?
- How relevant and concrete are the examples and exercises proposed in link with the specific working context of the participants?
- The relevance and quality of the programme designed by the tenderer regarding the needs and expectations of the participants and institutions (28 points).

The following questions will be taken into account for the evaluation of this point:

- How relevant are the approaches of the topic developed in the programme for the participants (taking into account the level at which they are addressed)?
- How clear and concrete are the objectives described for the programme and how coherent is the programme with those objectives?
- How challenging and pushing is the programme (bringing the participants outside of their habits or usual patterns)?
- How innovative is the programme in regard of methods and approaches?
- How does the programme promote interaction and exchange between participants coming from various institutions?
- How does the programme open new perspectives for the participants and possibilities for their further development?

- What does the tenderer proposes in terms of evaluation of the impact of the programme?

Criterion 3 : Quality of a proposal for a blended learning programme for new Heads of Unit (or equivalent).

A maximum of 40 points can be attributed to this criterion (minimum threshold 28 points)

The tenderer must submit a document of no more than 10 pages (font Arial 12pt) outlining the objectives, methodology, and proposed content for a blended learning programme for new Heads of Unit (or equivalent). The description should include a statement of the potential problems encountered by Heads of Unit (or equivalent), the competencies required to face them and the different elements proposed. The outline should include descriptions of the individual elements including how the blended elements will fit within the whole and what will be done in order to enable the learning in the non-classroom elements. The document will also indicate precisely how the proposal is geared to the specific context of the institutions. It will also include a more complete description (at least one page) of one remote learning session.

The above criterion will be assessed based on the following aspects:

- The general quality of the course designed (16 points).

The following questions will be taken into account for the evaluation of this point:

- How relevant are the approaches of the topic developed in the programme for the participants (taking into account the level at which they are addressed?)
- How clear and concrete are the objectives described for the programme and how coherent is the programme with those objectives?
- How challenging and pushing is the programme (bringing the participants outside of their habits or usual patterns)?
- How innovative is the programme in regard of methods and approaches?

- The quality of the blend between the various elements and learning methods (12 points).

The following questions will be taken into account for the evaluation of this point:

- How good is the balance between the different components and learning methods?
- How good is the continuity and the links between the different components?
- How effective is the support offered to enable the learning in the non-classroom elements?

- The quality (quality of the methods and tools and how the learning transfer is to be ensured) of the design of 1 remote session (12 points).

The following questions will be taken into account for the evaluation of this point:

- How does the proposal capture the participants' attention and lift obstacles to their participation and engagement in the remote session?

- How does the proposal use the remote session to include elements related to the direct work environment of the participants in the process?
- How does the proposal use the remote session to promote autonomy and self-discovery in learning?

Criterion 4 : Quality of the procedure for selecting, preparing and evaluating trainers.

A maximum of 40 points can be attributed to this criterion (minimum threshold 28 points)

The tenderer must submit a document of no more than 4 pages (font Arial 12 pt) explaining how the contractor will select the trainers to be proposed to the School, in particular those for the high and very high levels of management and how it will ensure continuous evaluation of the services provided by the trainers.

The above criterion will be assessed based on the following aspects:

- Suitability of methodology for trainers selection (16 points)

The following questions will be taken into account for the evaluation of this point:

- How does the proposed methodology ensure the selection of trainers with a high level of relevant experience in the field of management?
- How does the proposed methodology ensure the selection of trainers with a good mix of general and a more specialised (e.g. people management, strategic management, participatory approaches of management, etc.) knowledge and competencies in the field of management?
- How does the proposed methodology ensure the selection of trainers with a high level of facilitation skills?
- How does the proposed methodology ensure a good gender balance and cultural diversity in the trainers' team?

- Suitability of methodology for trainers preparation (8 points)

The following questions will be taken into account for the evaluation of this point:

- How does the proposed methodology ensure that trainers will be prepared to deliver training in the specific EU environment?
- How does the proposed methodology ensure that trainers will be prepared to deliver training in the format that has been designed and approved by the School?

- Suitability of the methodology for evaluation and follow up (16 points)

The following questions will be taken into account for the evaluation of this point:

- How does the proposed methodology allow an effective follow up of the level of performance of the trainers?
- How does the proposed methodology ensure that the School and the other contracting authorities are informed about the level of performance of the trainers?

- How does the proposed methodology ensure a continuous development of the trainers' talents and competence?
- How does the proposed methodology deal with incidents (low level of evaluation, etc.)?

Criterion 5 : Quality of a video training capsule.

A maximum of 40 points can be attributed to this criterion (minimum threshold 28 points)

The tenderer must submit a video capsule conceived as a part of the blended programme mentioned under criterion 3. The capsule submitted should be in mp4, flv, mov or wmv format archived in to a zip file or rar archive.

The above criterion will be assessed based on the following aspects:

- Quality of the format (16 points)

The following questions will be taken into account for the evaluation of this point:

- How good is the technical quality of the image in the video?
- How good is the technical quality or the sound in the video?
- How good is the editing of the video (use of various shots, of titles and subtitles, etc.)?
- How appropriate is the size (expressed in MB) of the video file for a publication on the web?

- Quality of the content and pedagogical approaches (24 points)

The following questions will be taken into account for the evaluation of this point:

- How consistent is the video with the general context of the programme (blended programme for new Heads of Unit)?
- How does the video capture the participants' attention?
- How relevant are the approaches of the topic developed in the video for the participants (taking into account the level at which they are addressed)?
- How clear is the message conveyed by the video?
- How well does the video trigger reflexion or action?
- How innovative and/or original is the general conception of the video?

Only the tenders having reached the minimum threshold for each qualitative award criterion and at least a total number of points equal to 140 out of 200 will be considered for the financial evaluation. Tenders that do not reach the minimum quality thresholds will be rejected.

III.3.3. PRICES AND FINANCIAL EVALUATION

After verification of the conformity of financial tenders submitted, the financial evaluation will be based on the analysis of the result of the scenario, as described in the financial tender form (Annex 4), among the admissible tenders who passed the technical evaluation.

The volume estimates provided in the financial tender form are not binding to the contracting authority with regard to actual orders to be placed. They are only a scenario intended to provide a fair basis for the financial evaluation of the tenders. In the event that the tender is awarded the framework contract, only the unit prices will be binding.

If there is an error in the calculation of the total, the unit price shall prevail.

To present its financial offer, the tenderer must complete the financial tender form in Annex 4 with the utmost care. A separate form shall be submitted for each lot.

The price for the tender must be expressed in euro (to two decimal places). Tenderers from countries outside the eurozone must also quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to assume the risks or the benefits deriving from any variation.

Where a service is provided free of charge, the tenderer must indicate EUR 0,00.

The prices quoted must be unit prices, inclusive of all costs.

As the European Union is exempt from all taxes and dues, including value added tax (VAT), under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union, prices must be quoted free of duties, taxes and dues.

While establishing your price, please remember that the price for delivery should also include all related costs, such as preparation and training of the trainers, all administrative costs (project management, etc.) and printing of documentation for the participants.

For training courses delivered in Brussels or Luxembourg your price should also include possible accommodation, travel and subsistence costs for the trainers.

Consider also that for webinars and other forms of distance training, the price for training delivery in Brussels will be applied. No additional payment will be made related to other costs (e.g. the technical equipment or software needed by trainers).

III.3.4. AWARD FORMULA

To determine the order in which the tenders are ranked, the total score awarded to each tender will be calculated as follows:

Score for tender X	=	$\frac{\text{Lowest price}}{\text{Price of tender X}}$	*	100	*	Price weighting (30%)	+	Total quality score (out of 200) for all award criteria of tender X divided by 2 (to get a score out of 100)	*	Quality criteria weighting (70%)
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All offers above the minimum quality threshold are ranked.

The tender which, in the final evaluation, receives the highest score will be considered the most economically advantageous tender (in descending order of points).

The tenders ranked 1st, 2nd and 3rd after application of the award formula will be considered the tenders to which the contract is awarded in respectively 1st, 2nd and 3th position.

IV. PART IV — CONTENT AND PRESENTATION OF TENDERS

Each tender must be clear, be concise and contain all the information and documents necessary to enable the contracting authority to conduct an evaluation of the tender on the basis of the exclusion criteria, selection criteria and award criteria. It is the responsibility of the economic operators wishing to submit a tender to ensure that the tender is complete.

All documents requested must be produced using font ‘arial 12’

All documents requested must be signed by the tenderer’s legal representative, i.e. a person duly authorised to represent the tenderer for this call for tenders and the signing of the contract.

Where annexes are reproduced on a word processor, you should take care not to make any changes to the original.

Tenders must be delivered according to the requirements set out in the call for tenders and the present specifications, and before the date and time indicated in the invitation to tender.

Each tender must contain the following documents and information:

PART I: ADMINISTRATIVE INFORMATION		
IDENTIFICATION OF THE TENDERER		
A covering letter written on the headed notepaper of the tenderer (lead tenderer in the case of a joint tender) and signed by the tenderer or his duly authorised legal representative, with the reference of the procedure and lot “ EPSO/EUSA/PO/2018/028 – LOT 1 ”.	<input type="checkbox"/>	
<u>In the case of a group</u> , submit the Annex 2 (separation of tasks) and the power of attorney , designating the lead contractor as leader.	<input type="checkbox"/>	Section II.4
<u>In the case of subcontracting</u> , submit the Annex 2 (percentage of the total value of the contract which will be subcontracted) and the declaration/letter of intent .	<input type="checkbox"/>	Section II.5
EXCLUSION CRITERIA		
Declaration(s) on the tenderer’s honour and the members of the group and the subcontractors where the part of the contract to be executed exceeds the threshold of 10 %, duly completed, dated and signed (Annex 3). <i>Original(s) signed by hand must be sent by letter (see invitation to tender).</i>	<input type="checkbox"/>	Section III.1

SELECTION CRITERIA		
Declaration on honour by the tenderer/leader duly completed, dated and signed (Annex 3). <i>Original(s) signed by hand must be sent by letter (see invitation to tender).</i>	<input type="checkbox"/>	Section III.2
A statement of the annual turnover for each of the last 3 financial years closed.	<input type="checkbox"/>	Section III.2.1
A list of training courses for managers delivered in the last 3 years (Annex 5)	<input type="checkbox"/>	Section III.2.2
The CV of the designated project manager	<input type="checkbox"/>	Section III.2.2
The CV of the designated coaching manager	<input type="checkbox"/>	Section III.2.2
The CVs of at least 2 other members of the project team	<input type="checkbox"/>	Section III.2.2
PART II: TECHNICAL TENDER		
The document related to the criterion 1 : Quality of the proposal of a programme for long-standing directors on strategy and vision.	<input type="checkbox"/>	Section III.3.2
The document related to the criterion 2 : Quality of the proposal of a programme for managing performance.	<input type="checkbox"/>	Section III.3.2
The document related to the criterion 3 : Quality of a proposal for a blended learning programme for new Heads of Unit (or equivalent).	<input type="checkbox"/>	Section III.3.2
The document related to the criterion 4 : Quality of the procedure for selecting, preparing and evaluating trainers.	<input type="checkbox"/>	Section III.3.2
The document related to the criterion 5 : Quality of a video training capsule.	<input type="checkbox"/>	Section III.3.2
PART III: FINANCIAL TENDER		
Financial tender form (Annex 4)	<input type="checkbox"/>	Section III.3.3

The financial tender form must be duly dated and signed by the legal representative of the tenderer.

This form may not include any items other than those requested. Therefore, it is expressly forbidden to propose options or variants. Any bid failing to comply with this will be rejected.

PART IV: TENDER REPORT

Tender report (a document generated by e-Submission and listing all the documents included in the tender, to be signed by the tenderer or the group leader in case of a joint tender).

Original signed by hand must be sent by letter (see invitation to tender).

V. PART V — ANNEXES

The following documents are annexed to these specifications and form an integral part of these specifications:

Annex 1: List of management courses currently delivered by the School (including examples of competencies for managers in the EU Institutions)

Annex 2: Joint tender and subcontracting declaration

Annex 3: Declaration on the tenderer's honour concerning the exclusion criteria and selection criteria

Annex 4: Financial tender form

Annex 5: Technical and professional capacities (tenderer's experience)