

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 2: Coaching for managers and teams

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):

‘Coaching’ means, when it is used for lot 2, a structured development process aimed to optimise work-related functioning. It is based on a formal relationship between a professional coach and an individual, a group or a team. It may consist in individual face-to-face sessions, telephone or internet sessions, or collective sessions. It uses specific competencies and techniques to open new perspectives and to stimulate action or higher impact and sustainable change. Coaching is NOT mentoring (advice based on experience), therapy (process aiming to heal), training (instruction, learning), expert consulting or process consulting;

‘Individual coaching’ means individual face-to-face sessions, telephone or internet sessions offered to an individual client;

‘Team coaching’ means coaching of an organisational unit together with their manager;

‘Group coaching’ means coaching of a collection of persons, who do not necessarily work together;

‘Tripartite coaching’ means a coaching process including a discussion between a coach, a coachee and one or two key stakeholders who can support the coachee’s development during the coaching process (for example, at the start and end of the coaching process);

‘co-coaching’ means coaching delivered in common by 2 or more coaches, in particular internal coaches working with coaches provided by the contractor;

‘Coach’ means a qualified individual who leads the coaching session;

‘Internal coach’ means an official who is fully qualified as a coach;

‘Coachee’ means the person who benefits or has benefited from a coaching session;

‘Tenderer’ means the economic operators who choose to submit a tender;

‘Successful Tenderer’ means a tenderer whose tender has been accepted following the call for tender 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 and the spread of common values, and to develop synergies in the use of human and financial resources.

The framework contracts awarded following Lot 2 of this tender procedure are for the provision of individual, tripartite, team or group coaching services that are not part of specific training courses. When coaching, the coaches may also be asked to use relevant leadership assessment tools.

Please note that coaching items incorporated in management training programmes are not included in this lot but form part of the services to be provided under lot 1.

The purpose of this lot is therefore to identify tenderers who can put at the disposal of the contracting authorities a pool of highly qualified and experienced coaches who are familiar with the challenges of the public sector and/or an international/multinational organisation and who are able to work with management personnel at senior, middle and lower level.

The contractor will be responsible, in collaboration with the School and any representative of the contracting authorities, for providing coaches, assessment tools and monitoring the quality of the services provided.

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 coaching 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 coaches. With this in mind it is imperative that there is significant value added from outside coaches in view of synergies and co-coaching with internal coaches.

Since one of the key features of the School is the interinstitutional nature of its activities, it will only rarely require such services. The other contracting authorities, on the other hand, will

clearly benefit from the existence of a common pool of highly qualified coaches as this will ensure that the standard and type of coaching offered is the same across all the institutions.

This will help contribute to the creation of a community of managers who have received coaching 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 2 is to conclude a multiple cascading framework contract with a maximum of three service providers to ensure the following:

the provision of a team of highly qualified coaches to answer the various coaching needs of staff performing management duties or likely to perform such duties in the future. These services are open to the staff of all the contracting authorities.

I.3. DESCRIPTION OF SERVICES — MINIMUM TECHNICAL REQUIREMENTS LOT 2

I.3.1. GENERAL INTRODUCTION

The contractor's main tasks under Lot 2 will be:

- i. to provide a team of coaches, including highly qualified coaches (some of whom should be able to act as coach trainers and coach supervisors.) with significant experience of management themselves, to provide coaching services (including, for some, coach training and coach supervision for internal coaches) on behalf of the School and the other contracting authorities,
- ii. to proactively monitor the evaluation of the coaching 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 in collaboration with the contracting authorities concerned. Most of the institutions request coaches to meet the individual needs of management staff, from unit-head level upwards. However, increasingly team coaching is being used to improve the internal working of the team, its ability to adapt to change, develop new strategies and achieve its objectives, etc.

The coaching services should also include providing advice and assistance (including supervision) to improve the quality, relevance or range of the internal coaching offer.

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.

Occasionally, depending of the staff development policies of the institutions, some team leaders will also have access to coaching services.

Coaching could also be requested for teams, with their managers as the primary point of liaison or 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. Coaching 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.

1.3.3. QUALITY ASSURANCE AND MONITORING

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

The contractor will set up an evaluation system to monitor and ensure the quality of the services supplied. Under no circumstances, this system will collect data related to the specific content of the coaching sessions. The contracting authorities will have a direct, complete and permanent access to the evaluation data collected by the contractor.

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

I.3.4. 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 the coaching service requirements and coordinating 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 coaches.

Coaching manager

For the purpose of managing the coaches, their qualifications and supervision and all the other issues related to the quality of delivery and professional coaching, the contractor must designate a coaching manager (full time) who will coordinate and take primary responsibility for the selection of coaches and the best matching of coaches to the coachees and needs of the contracting authorities.

The coaching manager will be responsible for ensuring the quality of the coaching services provided and for the professional development of coaches, which will include ensuring they are familiar with the institutional environment in which they are working.

The coaching manager will be responsible for collecting any information from coaches that may be useful about the coaching sessions. This information will be passed on in writing to the contracting authority concerned.

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

Contract management team

In addition to the project manager and the coaching 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.).

Coaches

Coaches can be members of the permanent team of the contractor or freelance subcontractors. The coaches must pass the accreditation process as described in point I.3.5.

Replacement of project manager or coaching manager

As the qualifications and language skills of the project manager and coaching 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.3.5. ACCREDITATION OF COACHES

The coaches proposed must have sufficient experience of working in an international context and some notion of the activities and culture of the institutions. They must also possess a high level of competence in the field in which they are delivering coaching. In particular, for senior management, coaches must have a long experience of coaching as well as management experience.

Tenderers must be able to show that they can provide high-quality services with coaches who are able to deal with all kinds of questions relating to the professional position of the coachees. The coaches provided must have a wide and proven experience in questions of management and organisational, training and development issues at the highest level, in particular in international/multinational public-sector organisations. Coaches for senior management must be able to draw on great expertise so as to meet the demands of this particular level.

Since coaching is delivered in English and in French, the contractor will have to provide coaches sufficiently competent in those languages. The contractor must therefore propose coaches with a command of at least one of them that is close to that of a native speaker (at least level C1 of the ‘Common European Framework of Reference for Languages’)

Where necessary, the contractor will make proposals to improve quality, in particular in the light of comments or feedback from the contracting authorities and or those receiving coaching.

The contractor should only propose coaches who are affiliated to one of the international coaching federations, such as the International Coaches Federation (ICF) or the European Mentoring and Coaching Council (EMCC).

Coaches must undergo all training, certification or supervision procedures recommended by the federation to which they belong to; the contracting authorities will not grant any remuneration or compensation in this respect.

Coaches who are not formally members of such federations could exceptionnaly be proposed, after formal and written approval by the contracting authorities, if they prove that they are undergoing professional development and supervision procedures similar to those imposed by those federations.

All coaches (including those affiliated to a federation) must also obtain a formal accreditation from the School before they start working. This accreditation is based on an examination of their curricula vitae, an interview and a practical test, all aimed to verify if the coach 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 coach or another coach with the required profile.

I.3.6. RESPONSIBILITIES OF COACHES

In the coaching approaches used, in their attitude, and the content of the services provided, the coaches 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.

Coaches 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 coaches will also keep up to date and comply with the specific rules set up by the contracting authorities in order to deal with sensitive issues (conflicts at work, harassment, health issues, etc.)

All sessions of coaching agreed with a specific coachee or group of coachees will be given by the same coach from start to finish, except if the coachee(s) request(s) the replacement of this coach.

Communication with the coaches will pass through the project manager or the coaching manager. For urgent issues, the contracting authorities have to be able to contact directly the coaches.

All coaches should undergo at least 6 supervision sessions per year. Coaches who do not fulfil this obligation will not be authorised to deliver coaching services under this framework contract. No payment will be made by the contracting authorities in relation with this supervision process.

When delivering coaching, coaches should be ready to take the necessary time for the preparation of their coaching sessions. As a benchmark, we generally consider that delivery of individual coaching requires in average preparation time the equivalent to 25 % of the actual time for coaching. For group or team coaching this preparation time amounts in average to 100 % of the effective time of coaching. This preparation time will never be paid separately (only coaching delivery time spent with the clients will be paid) and it should therefore be included in the price for coaching delivery (see point III.3.3).

I.3.7. 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 include, for example:

- Provision of external speakers (for example leading recognised experts in the field of coaching) for the development of the coaching skills of the internal coaches
- Provision of coaching training services
- Provision of coaching supervision services
- Hosting and catering services (conclusions of contracts with hotels, restaurants or other facilities), especially for group or team coaching
- Use of various type of pedagogical tools (personality assessment and other assessment tools, access to external websites, “360°” assessment softwares, etc.)
- Renting of any type of device or material

I.4. DELIVERABLES, TIMETABLE AND REPORTING

In general, the contracting authorities will order coaching and related services on an ad hoc basis.

A quarterly report, in the form of a spreadsheet (compatible with Microsoft Excel ®) must be provided to the School and each contracting authority. The reports 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 and 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.

In addition to the contractual and financial reports, the contractor will also provide the contracting authorities with quarterly reports including all relevant data concerning the coaching sessions delivered. These reports should include, for example: type of coaching delivered, general characteristics of clients (grade/function/gender, etc.), context (transition/first post/conflict situation/career development, etc.), general description of the objectives, number of hours, whether first coaching, evaluation of outcomes and impact, etc. This report should also include a precise monitoring of the delivery of each of the coaches for the whole quarter. No personal data or elements allowing the clients to be recognised should be included in these reports.

All the reports 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 price reductions foreseen in the framework contract.

I.5. MEETINGS

Management and coordination meetings at the explicit request of a contracting authority

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

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

Any meeting with other contracting authorities and at their request will be paid at the rate mentioned for this type of service in the financial tender form. No payment will be made for meetings if they are not formally requested in a purchase order.

A meeting for a duration of less than 90 minutes will be paid at half the price of a half day meeting.

For this type of meeting, travel, subsistence or accommodation expenses will never be reimbursed.

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

Meetings of coaches at the explicit request of a contracting authority

Coaches 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 meetings will be paid at the rate foreseen in the financial tender form for meetings (including where appropriate for the project manager and the coaching manager).

Travel, accommodation and subsistence expenses will be reimbursed only if the meeting is organised outside of Brussels or Luxembourg 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. PLACE (S) OF PERFORMANCE AND RELATED COSTS

The coaching sessions will be given mainly in Brussels and Luxembourg, and to a lesser extent in other places in the European Union, on the premises of the contracting authorities or in outside training rooms made available by the contracting authorities.

Travel, accommodation and subsistence expenses for coaching sessions 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 coaching in Brussels or Luxembourg. Those costs should therefore be included in the hourly rate proposed in the financial tender form.

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

For distant coaching as well as for face-to-face coaching, the individual equipment needed by coaches (PC or laptop, 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 hourly 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 coaches to deliver coaching outside of Brussels or Luxembourg.

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 public holidays after the signature of the contract.

I.8. LANGUAGE SERVICES

Coaching sessions will normally be given in either English (80%) or French (20%), or in both languages for collective sessions.

Coaches must be able to demonstrate their ability to provide coaching in either English or French, mastering the relevant language to the level of a native speaker. In individual coaching sessions, coaches may also use a language other than English or French if it is the language of the person being coached, provided the coach's command of the language is equivalent to that a native speaker.

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

I.9. VOLUME OF SERVICES

Based on annual estimates for 4 years, the total volume of services to be provided under the framework contracts 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.

II.3. VARIANTS

Variants, i.e. 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.

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).

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, a detailed description of the service(s), the price in euros, the language(s) to be used for performance, performance dates where applicable, the name of the coaches 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.

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 may issue these purchase orders in a grouped manner (purchase orders for a series of coaching sessions 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 coaching 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 the penalty in the same conditions as if the coaching 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 coaching sessions have effectively been delivered. These supporting document 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 all the coaching sessions delivered during the invoicing period, with the signature of the coaches and the coachees.

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 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:

- (1) When submitting a tender only for Lot 2 (coaching for managers), 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 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 provided an average of at least 1000 hours of coaching for managers for **each** of the past three years.

Out of these 1000 hours, the tenderer should have delivered at least each year :

- an annual average of 200 hours of coaching to senior managers (directors or directors general or equivalent in companies or institutions of more than 1000 people)
- an annual average of 200 hours (not necessarily the same that for the previous point) to managers working in an international and culturally diverse context

To this end, tenderers must complete and submit Annex 5, consisting of a list showing that they have provided coaching 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 of the coaching delivered which will be taken into account and not the multicultural or international nature of the organisation.

For each coaching assignment, the list in Annex 5 should indicate:

- ✓ the name and address of the company or institution for which the coaching has been delivered
- ✓ the level of responsibility of the persons being coached
- ✓ the general subject of the coaching,

- ✓ the duration in hours of the coaching (if the coaching goes over more than one single calendar year, a breakdown of these hours per year is also needed)
- ✓ a description as to how 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 coaching 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 coaching manager who :

- has at least 5 years' professional experience in supervising a team of coaches and developing their professional abilities 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 coaching manager.

3. A project management team, consisting of at least two other persons 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 the completed CV's for at least 2 other full time members of the project management team.

For the purpose 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 100 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 general approach to coaching.

A maximum of **25** points can be attributed to this criterion (minimum threshold 17 points)

The tenderer must submit a document of no more than 3 pages (font Arial 12 pt) setting out the tenderer's vision of coaching, and the methodologies its coaches will use to set objectives and ensure they are attained.

The above criterion will be assessed on the basis of the following aspects:

- How good is the quality of the tenderer's general approach to coaching?
- How good is the quality of the methodology with regard to taking into account the needs and objectives to be set for individual coaching (“contracting phase”)?
- How good is the quality of the methodology with regard to ensuring the attainment of the objectives that have been set for individual coaching?
- How good is the quality of the methodology with regard to taking into account the needs and objectives to be set for group or team coaching (“contracting phase”)?

- How good is the quality of the methodology with regard to ensuring the attainment of the objectives that have been set for group or team coaching?

Criterion 2 : Quality of the approaches to be implemented to provide high level coaches.

A maximum of **25** points can be attributed to this criterion (minimum threshold 17 points)

The tenderer must submit a document of no more than 3 pages (font Arial 12 pt) showing how the tenderer intends to ensure the availability of high-level coaches (including some coaches able to ensure training and supervision tasks as well as some coaches specialised in group or team coaching), capable of working with all levels (including senior) of management.

The above criterion will be assessed on the basis of the following :

- How does the tenderer ensure that the coaches have the necessary qualifications and professional and personal characteristics to deliver a high level of service (including for some coaches training, supervision, group coaching or team coaching)?
- How does the tenderer ensure that the coaches have a proper understanding of the context of the EU Institutions?
- How does the tenderer ensure an effective and regular supervision of the coaches?
- What measures does the tenderer propose to attract high-level coaches (some of them being qualified for coach training or coach supervision)?
- How does the tenderer ensure quality control of its processes for the recruitment, preparation, supervision and evaluation of coaches?

Criterion 3 : Quality of the understanding of the context, needs and issues/challenges of the managers in the EU Institutions.

A maximum of **20** points can be attributed to this criterion (minimum threshold 14 points)

The tenderer must submit a document of no more than 3 pages (font Arial 12 pt) setting out the tenderer's understanding of the coaching needs within the Institutions and the problems the target populations face. This document will clearly show the tenderer's understanding of the different aspects to take into account for the different levels of management and how the coaching might differ.

The above criterion will be assessed on the basis of the following :

- How relevant is the tenderer's understanding of the needs/issues/challenges for managers of all levels, specific to the context of the institutions?
- How relevant is the tenderer's understanding of the needs/issues/challenges more specific to senior managers (directors general and directors or equivalent)?
- How relevant is the tenderer's understanding of the needs/issues/challenges more specific to middle managers (heads of units and equivalent)?
- How relevant and specific are the various approaches of coaching recommended for the various level of management?

Criterion 4 : Quality of the integration of a management and leadership feedback tool.

A maximum of **10** points can be attributed to this criterion (minimum threshold 7 points)

The tenderer must submit a document of no more than 3 pages (font Arial 12 pt) showing how the tenderer might integrate a 360° management and/or Leadership feedback tool into a coaching offer and what the objectives, criteria and approach might be.

The above criterion will be assessed on the basis of the following :

- How relevant are the objectives and approach proposed for the integration of a management and leadership feedback tool in the coaching of managers?
- How does the tenderer ensure that the tool will bring the highest added value possible in the coaching process?

Criterion 5 : Quality of the method of working with internal coaches.

A maximum of **10** points can be attributed to this criterion (minimum threshold 7 points)

The tenderer must submit a document of no more than 2 pages (font Arial 12 pt) showing how the tenderer could work together with the pools of internal coaches to create a powerful synergy throughout the institutions for spreading the common values of the Union.

The above criterion will be assessed on the basis of the following :

- How well does the tenderer propose ways of working with internal coaches in order to maximise the potential of external and internal coaches working together?
- How relevant are the approaches proposed by the tenderer to promote exchange of information, knowledge and know-how between internal and external coaches?

Criterion 6 : Quality of the method of reporting of coaching.

A maximum of **10** points can be attributed to this criterion (minimum threshold 7 points)

The tenderer must submit a document of not more than 2 pages (font Arial 12 pt) showing how the tenderer intends to track coaching sessions to be able to provide institutions with up to date data on all their coaches' activities.

The above criterion will be assessed on the basis of the following :

- How well does the tenderer ensure a fast, complete and useful reporting of the volume of delivery of coaching?
- How well does the tenderer ensure a fast, complete and useful reporting of any other useful type of information for the institutions (see point I.4) ?

Only the tenders having reached the minimum threshold for each qualitative award criterion and at least a total number of points equal to 70 out of 100 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 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 price 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 take into account the responsibilities of the coaches as they are described under point I.3.6.

Remember that the price for coaching delivery should include all related costs, such as preparation, supervision and training of the coaches, individual preparation time for any coaching sessions and all administrative costs (project management, etc.).

As a benchmark, we generally consider that delivery of individual coaching requires in average preparation time equivalent to 25 % of the actual time for coaching. For group or team coaching this preparation time amounts in average to 100 % of the effective time of coaching. This preparation time will never be paid separately (only coaching delivery time spent with the clients will be paid) and it should therefore be included in the price for coaching delivery.

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

For coaching at distance, no additional payment will be made related to other costs (e.g. the technical equipment or software needed by trainers, etc.).

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 100) for all award criteria of tender X	*	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(s) “ EPSO/EUSA/PO/2018/028 – LOT 2 ”.	<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	<input type="checkbox"/>	Section II.5

declaration/letter of intent.		
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>Originals 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>Originals 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 coaching services provided 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 2 additional members of the team	<input type="checkbox"/>	Section III.2.2
PART II: TECHNICAL BID		
The document related to the criterion 1 : Quality of the general approach to coaching.	<input type="checkbox"/>	Section III.3.2
The document related to the criterion 2 : Quality of the approaches to be implemented to provide high level coaches.	<input type="checkbox"/>	Section III.3.2
The document related to the criterion 3 : Quality of the understanding of the context, needs and issues/challenges of the managers in the EU Institutions.	<input type="checkbox"/>	Section III.3.2
The document related to the criterion 4 : Quality of the integration of a management and leadership feedback tool.	<input type="checkbox"/>	Section III.3.2

The document related to the criterion 5 : Quality of the method of working with internal coaches.	<input type="checkbox"/>	Section III.3.2
The document related to the criterion 6 : Quality of the method of reporting of coaching.	<input type="checkbox"/>	Section III.3.2
PART III: FINANCIAL TENDER		
Financial tender form (Annex 4)	<input type="checkbox"/>	Section III.3.3
<p>The financial tender form must be duly dated and signed by the legal representative of the tenderer.</p> <p>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.</p>		
PART IV: TENDER REPORT		
<p>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).</p> <p><i>Original signed by hand must be sent by letter (see invitation to tender).</i></p>	<input type="checkbox"/>	

V. PART V — ANNEXES

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

Annex 1: Examples of coaching packages (including the competencies requested from 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)