



EUROPEAN COMMISSION
EUROSTAT

Directorate C: Macro-economic statistics
The Director (acting)

Invitation to tender for the supply of statistical services

Purchasing Power Parities (PPPs) for capital goods and hospital services

(ESTAT/LUX/2020/OP/0006)

Tender specifications

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SECTION 1 INTRODUCTION

1.1 Presentation of Eurostat

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

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

More information can be found on the Eurostat's website: <http://ec.europa.eu/eurostat>

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

1.2 Subject of the contract

This invitation to tender covers Purchasing Power Parities (PPPs) for capital goods and hospital services.

The statistical services forming the subject of this invitation to tender are divided into the following lots:

Lot 1: Co-ordination of the 2021 PPP price survey on equipment goods

Lot 2: Co-ordination of the 2021 and 2022 PPP price surveys on construction

Lot 3: Co-ordination of the 2021-2024 PPP price surveys on hospital services

Each lot is the subject of a separate contract. Tenderers may submit a tender for any number of lots, but not for parts of lots.

1.3 Glossary

BoQ	Bill of Quantities
CIRCABC	Communication and Information Resource Centre for Administrations, Businesses and Citizens
eDAMIS	Electronic Data Files Administration and Management Information System
ESA	European System of Accounts
ILMT	Item List Management Tool
NSI	National Statistical Institute
QT	Quaranta Table
SPD	Structured Product Descriptions
VT	Validation Tool
MET:	Metadata Entry Tool
ECP	European Comparison Programme
ICP	International Comparison Programme

See also the glossary included in the "[Eurostat-OECD Methodological Manual on Purchasing Power Parities](#)".

SECTION 2 TECHNICAL INFORMATION ON LOTS

GENERAL INFORMATION

What are Purchasing Power Parities?

Purchasing Power Parities (PPPs) are indicators of price level differences across countries. PPPs tell us how many currency units a given quantity of goods and services costs in different countries. PPPs can thus be used as currency conversion rates to convert expenditures expressed in national currencies into an artificial common currency (the Purchasing Power Standard, PPS), eliminating the effect of price level differences across countries.

The main use of PPPs is to convert national accounts aggregates, like the Gross Domestic Product (GDP) of different countries, into comparable volume aggregates. Applying nominal exchange rates in this process would overestimate the GDP of countries with high price levels relative to countries with low price levels. The use of PPPs ensures that the GDP of all countries is valued at a uniform price level and thus reflects only differences in the actual volume of the economy.

PPPs are also applied in analyses of relative price levels across countries. For this purpose, the PPPs are divided by the current nominal exchange rate to obtain a price level index (PLI) which expresses the price level of a given country relative to another, or relative to a group of countries like the EU.

The production of PPPs is a multilateral exercise involving the National Statistical Institutes of the participating countries, Eurostat and the OECD, which is known as Eurostat-OECD programme or European Comparison Programme (ECP).

Across the world, regional PPP programs exist. These programs and the Eurostat-OECD PPP program are linked together at global level by the World Bank in the International Comparison Program (ICP), producing PPPs for nearly 200 countries across the world.

Country coverage

Eurostat is in charge of the annual calculation and dissemination of PPPs for 37 European countries. These include all the EU Member States, the United Kingdom, 3 EFTA Member States (Iceland, Norway and Switzerland), 5 EU candidate countries (North Macedonia, Montenegro, Albania, Serbia and Turkey) and a potential candidate country (Bosnia and Herzegovina). **The inclusion of the United Kingdom in the Eurostat PPP program may depend on the Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland (“United Kingdom”) from the European Union and the European Atomic Energy Community¹, and on the future relationship between the United Kingdom and the European Union. For this reason, tenderers are requested to provide a separate price for the part of the activities that relate to the UK in Annex 6.**

Georgia and Ukraine participate in the ICP through the Eurostat-OECD PPP program.

Legal basis

The common rules for the provision of basic information (input data), the calculation and dissemination of PPPs are laid down in [Regulation \(EC\) No 1445/2007](#) of the European Parliament and of the Council of 11 December 2007.

Within the framework of the Regulation, the methodologies and the publishing policies are agreed within the PPP Working Group. The results as calculated by Eurostat are distributed to the NSIs for validation and approval prior to dissemination.

The full methodology of the PPP programme is published in the "[Eurostat-OECD Methodological Manual on Purchasing Power Parities](#)". A summary description can be found in the [metadata](#) on the Eurostat website.

¹ Official Journal of the European Union, 2019/C 384 I/01.

Classification of expenditure: basic headings

PPPs are produced in accordance with the final expenditure classification of the European System of Accounts (ESA2010²). PPPs are classified by type of final expenditure – actual individual consumption expenditure, actual collective consumption expenditure and capital expenditure – and, in the case of actual individual consumption expenditure, by purchaser – households, non-profit institutions serving households (NPISHs) and general government. The prices underlying the calculation of PPPs adhere to the definitions, concepts, classifications and accounting rules of ESA2010.

The main expenditure aggregates comprising GDP are broken down into *basic headings*. The basic heading is the lowest level of aggregation, at which products are sampled and product prices collected. It is the lowest level for which countries should provide numerical expenditure weights. Below the basic heading level are the individual items of the product sample. For example, cheese is a basic heading and cheddar, camembert, feta, gorgonzola, gouda, etc. are individual products within it.

The basic heading classification was revised in 2015 (see [Commission Regulation 2015/1163 of 15 July 2015](#)). PPPs are published at the level of 61 "analytical categories" which comprise aggregates of basic headings and include some of the main expenditure aggregates like GDP, actual individual consumption, household final consumption, collective consumption and gross fixed capital formation. The full list of basic headings and analytical categories can be found [here](#).

² Regulation EU NO 549/2013 of the European Parliament and of the Council of 21 May 2013 on the European system of national and regional accounts in the European Union.

LOT 1: CO-ORDINATION OF THE 2021 PPP PRICE SURVEY ON EQUIPMENT GOODS

2.1 General information and objectives

Countries are required to carry out price surveys and provide price input data for household consumption, individual government consumption, collective consumption and gross fixed capital formation (investment). Reference (imputed) PPPs are used for NPISH consumption, inventories and net exports. The source data obtained from the surveys feed into the overall calculation of PPPs.

This lot concerns the co-ordination of the price surveys on equipment goods, which is one of the two surveys on gross fixed capital formation. The other survey is on construction, which is the subject of lot 2.

Equipment goods represent a large share of gross fixed capital formation, including machinery, electrical and optical equipment, transport equipment and software. The price survey on equipment goods is carried out every second year. This lot covers the survey to be carried out in 2021. Preparations for this survey start in 2020 while the survey validation will be closed in 2022.

The work covers the survey in all 37 participating countries (see "General information on all lots") plus some work for Georgia and Ukraine as participants in the ICP through the Eurostat-OECD PPP program.

For equipment goods, countries report national purchasers' prices for investment goods and services once every two years. The prices collected are mid-year prices because it is too costly to monitor prices over the whole year. Prices for equipment goods are obtained from producers, importers, distributors or actual purchasers. The survey data, when reported to Eurostat, are accompanied by a survey report in a standard format (see [here](#)).

Preparations for the survey include a preview and pre-survey, in which all countries investigate the availability and importance of a list of proposed products (the pre-survey list) and propose new products to be priced, in order to establish a final item list that is equally representative for all countries, to the extent possible.

All data are submitted by countries to Eurostat using the eDAMIS system, Eurostat's Single Entry Point application. This provides a secure data transmission. The contractor will receive the country submissions from the [eDAMIS system](#). Upon arrival, all data are directly loaded into the central PPP database by the contractor.

The entire survey process of list creation, price collection, validation and calculation is carried out with the integrated PPP on-line tools (see chapter 3.3.4 of the [Eurostat-OECD Methodological Manual on Purchasing Power Parities](#)).

The full methodology of the survey is described in chapter 10 of the "[Eurostat-OECD Methodological Manual on Purchasing Power Parities](#)".

The work requires very close cooperation with the NSIs and/or with the experts sub-contracted by the NSIs. All correspondence with the NSIs or their experts has to be documented.

2.2 Volume of the contract

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

- indicatively around 50 person-months;
- 37 country missions of a duration of one day.

The **estimated** total value is EUR 600,000 for the entire duration of the contract (27 months).

2.3 Tasks and expected results

The contract will include the following activities for 37 countries as well as data validation under activity 2 also for Georgia and Ukraine:

Activity 1: Establishment of the product list

This activity includes:

- preparing and presenting a document to the PPP Working Group meeting in November 2020 concerning the organisation of the pre-survey and survey (to be provided at least one month before the meeting);
- organisation of the survey by preparing and evaluating the preview of the survey, i.e. to prepare a first list of products (or items).
- establishing the equipment goods pre-survey list (including images of the items on the list) and pre-survey guidelines;
- answering questions from countries during the pre-survey. All questions and answers are done through the PPP tools;
- monitoring countries' activities during the pre-survey in order to ensure that the deadline is respected;
- evaluating new item proposals made by countries during the pre-survey;
- establishing the final equipment goods survey list, on the basis of the information gathered in the pre-survey;
- establishing the survey guidelines and other background material to instruct and guide the countries in the execution of the survey;
- updating the Excel "Data Tool" for the entering of price observations and other required information by countries;
- advising Eurostat on improvements of PPP methodology in the area of the equipment goods survey;
- contributing to the development of the software tools (see section 2.9) for the pre-survey and item list creation by testing prototypes of new versions and providing suggestions for improvements.

An example of the Data Tool can be found [here](#).

The pre-survey and survey lists contain typically about 400-500 items. Items are defined using Structured Product Descriptions (SPDs). SPDs are lists of characteristics to be used to describe a set of similar products. An example for equipment goods can be found [here](#). The SPDs are defined by Eurostat using input from the contractor. All work on item lists, including the country's pre-surveys, is carried out in the on-line Item List Management Tool (ILMT), see section 2.9.

The deliverables for this activity are:

- D1.1 Document (15-20 pages) and PowerPoint presentation (15-20 slides) for the PPP Working Group 2020.
- D1.2 Pre-survey list.
- D1.3 Pre-survey guidelines.
- D1.4 Final survey item list, including images of the items.
- D1.5 Survey guidelines and other background material.
- D1.6 The updated Excel Data Tool for data entry by countries.
- D1.7 Updated manual to the Data Tool.
- D1.8 Proposals for improvements of the PPP methodology.

Activity 2: Data gathering and validation

This activity includes:

- advising countries – by email, phone or in the country missions – during the price collection, e.g. by explaining item definitions or providing help with the use of the Data Tool;
- gathering of the survey data from the countries via eDAMIS (see section 2.1), together with their survey reports, and their upload to the PPP database according to the PPP work plan.

- validating the data using Quaranta tables (see Annex IV of the "[Eurostat-OECD Methodological Manual on Purchasing Power Parities](#)" for an explanation) and any other statistical tools (for example Excel or equivalent);
- communicating with the countries – either on-line in the Validation Tool (see section 2.9), by email, phone or in the country missions – on the quality of the submitted data (checking outliers, discussing plausibility, etc.);
- contributing to the development of tools to validate the equipment goods prices by testing prototypes of new versions and providing suggestions for improvements;
- preparing and presenting documents to the PPP Working Group meetings in 2021 and 2022, including an evaluation of the survey (to be provided at least one month before each meeting);
- validation of the equipment goods survey data at the global (international) level, by evaluating data provided by Georgia and Ukraine. Giving assistance to Eurostat during calculation/validation process by responding to all requests for clarifications or corrections. Eurostat is responsible for the calculation of the PPPs;
- advising Eurostat on improvements of PPP methodology in the area of equipment goods.

Validation includes checking the price and other data provided by the NSIs. In particular, the contractor will analyse the price data and deviations from item descriptions reported by the NSIs with the view of improving the number of usable prices by means of splittings. Validation includes also an evaluation of the plausibility of the resulting PPPs and a comparison of the results with previous surveys. Validation is an iterative process organised in a number of validation rounds that start and end with the calculation of a Quaranta Table and takes place within the on-line Validation Tool (VT), see section 2.9.

The deliverables for this activity are:

- D2.1 Document (15-20 pages) and PowerPoint presentation (15-20 slides) on the interim stage of validation to be presented to the PPP Working Group in November 2021.
- D2.2 Final validated prices for equipment goods from which reliable and plausible PPPs can be calculated.
- D2.3 An overall evaluation report and PowerPoint presentation on the execution of the survey to be presented to the PPP Working Group in November 2022.
- D2.4 Proposals for improvements of the PPP tools and methodology.

Activity 3: Missions to countries

To gather information on countries' markets, to discuss survey results and to advise countries in the carrying out of pre-survey and survey, the contractor shall undertake one mission of one day to each of the countries during the contract period. The contractor shall make up to 37 missions (business trips/country visits). The missions are to be distributed over the contract period and could take into account a direct need for a visit due to particular reasons (for instance, changes in a country's PPP team, specific methodological or data quality related problems, practical issues requiring assistance, etc.). Alternatively, the meeting could be held in Luxembourg at Eurostat premises if agreed with the country. In such case, the contractor will bear the costs for the country participants (up to 2 persons).

The contractor shall provide Eurostat with a detailed report of the mission, no later than 3 weeks after the end of the mission, listing the conclusions reached and key aspects discussed.

The language requirement for the country visits and the country specific working material is English.

The deliverables for this activity are:

- D3 Detailed mission reports (covering information on the country specific markets, survey results and advises in the carrying out of pre-survey and survey).

2.4 Meetings and missions

In addition to the 37 missions mentioned under activity 3, the following meetings and missions have to be provided for.

Meetings:

- A kick-off meeting (maximum duration one day) will be organised in Luxembourg at Eurostat's premises soon after the start of the execution of the tasks.
- Four Progress meetings (maximum duration one day each) with Eurostat staff will be held in Luxembourg, in Eurostat's premises, or with telephone or videoconference equipment, if agreed between all participants.

For these meetings the contractor will prepare discussion materials (documents covering state of play of the equipment goods survey, methodological issues and country missions) to be sent to Eurostat at least three working days prior to the meetings. The minutes of each of these meetings will be prepared by the contractor and sent to Eurostat for approval at the latest five working days after the meeting.

Missions:

- Participation in the PPP Working Group (maximum duration one day) in 2020, 2021 and 2022 at the Commission premises in Luxembourg.

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

2.5 Duration and timetable

The contract is expected to be signed in the 3rd quarter of 2020.

Execution of the tasks is to start on the date of entry into force of the contract. The overall duration of the work will be 27 months, covered by one contract.

The work has to be carried out in a very tight timeframe according to the PPP work plan of Eurostat. The PPP Working Group, consisting of the countries participating in the Eurostat PPP programme and Eurostat, decides on the work plan for the entire PPP programme of the next calendar year every autumn. These decisions will form part of the contract under this call for tender. As an example, the PPP work plan for the calendar year 2020 can be found [here](#).

The 2021 equipment goods survey process and approximate timetable are as follows:

- September – October 2020: preparation of the pre-survey list and other pre-survey material by the contractor;
- November 2020: PPP Working Group meeting which starts the survey process by agreeing on the overall survey design and timetable;
- December 2020 – February 2021: pre-survey carried out by the countries;
- February 2021 – March 2021: preparation of the final survey list and other survey material by the contractor;
- April 2021 – June 2021: price collection by the countries;
- June 2021: submission of the survey data and survey reports by the countries, via eDAMIS;
- July 2021 – November 2021: validation by the contractor, in co-operation with the countries, leading to presentation of interim results to the PPP Working Group in November 2021;
- November 2021 – April 2022: continued validation until final results are reached;
- November 2022: evaluation of the survey at the PPP Working Group meeting.

During the kick-off meeting, the contractor and Eurostat discuss, based on the contract, the concrete work programme and the timeline for the entire contract period.

The overall indicative timetable is the following:

	Activity 1 Establishment of the product list	Activity 2 Data gathering and validation	Activity 3 Missions to countries	Meetings
September 2020	X			Kick-off meeting – R
October	X – D1.1			
November	X – D1.2, D1.3			PPP Working Group
December	X			
January 2021	X			
February	X			Progress meeting – R
March	X – D1.4, D1.5, D1.6, D1.7, D1.8			
April		X		
May		X		
June		X		
July		X		
August		X		
September		X	X – D3	Progress meeting – R
October		X – D2.1		
November		X		PPP Working Group
December		X		
January 2022		X		
February		X		
March		X		Progress meeting – R
April		X – D2.2		
May		X		
June		X		
July		X		
August		X		
September		X		Progress meeting – R
October		X – D2.3, D2.4		
November		X		PPP Working Group

Legend:

- X: task's lifetime.
- D: deliverables (NB: Deliverables D3 - detailed report of the mission, no later than 3 weeks after the end of each mission).
- R: report of the meeting.

A detailed timetable should be provided by the tenderer in the tender. In addition, the contractor is requested to fill in Annex 9 "Compulsory reply form - checklist for deliverables."

2.6 Minimum requirements

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

- Include a detailed plan in line with the above overall indicative timetable of the activities envisaged to prepare the 2021 survey documentation and to validate data of all countries participating in the PPP exercise.
- In the tender, the tenderer shall specify how the establishment of the product list, data gathering and validation as well as missions will be organised.

Furthermore, the tender shall comply with applicable environmental, social and labour legislation established under Union legislation, national legislation, collective agreements or the applicable international social and environmental conventions listed in Annex X to Directive 2014/24/EU³.

2.7 Technical implementation reports

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

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

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

- Twenty seven months after the starting date of the execution of the tasks referred to in Article I.3 of the contract, the contractor shall provide, as soon as possible and within sixty days of completion of the tasks referred to in 2.3 of this tender specification, a final technical implementation report relating to the execution of the contract describing the results obtained and the means which were implemented for the execution of the contract.

These technical implementation reports shall accompany the corresponding invoice.

All important communication with the NSIs has to be documented and attached to the reports.

All reporting has to be done in English and the reports must be proof read by a person with English level C2.

2.8 Assessment of results

The progress of work under this project shall be monitored and followed by means of regular communication either by e-mail, telephone, videoconferences or meetings between the contractor and Eurostat.

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

- the quality of the item lists: a balanced structure, including comparable items that are representative for the participating countries, with a length according to agreed targets (based on the importance of the items as defined under activity 1);

³ OJ L 94 of 28.03.2014, p. 65

- the quality of the validation, evaluated by numbers of validation questions asked in the PPP tool and induced data changes by countries in the PPP tool as defined under activity 2 (taking into account that the number of validation questions depend on the quality of the countries' input data);
- the clarity of presentation of deliverables and reports and the quality of analyses therein, including the quality of conclusions and recommendations done for process improvement;
- the respect of deadlines.

2.9 Specific conditions

- Resources made available by Eurostat

Eurostat will provide and maintain all the electronic tools necessary to carry out the work, except the Excel Data Tool to enter price observations, which is to be maintained by the contractor. All data are stored in the central PPP database managed by Eurostat. All tools communicate with the central database. This includes in particular:

- The Item List Management Tool (ILMT): a web application that manages the entire process of creating item lists, including the creation of pre-survey lists, the entering of the pre-survey results by countries, the creation of the final survey list and the translation of final product lists by countries into their own language(s). For some screenshots, please click [here. Eurostat is currently using the ILMT version 10.14.2.](#)
- The Validation Tool (VT): a web application, which is used to visualise the countries' data, to validate them using Quaranta Tables and to communicate with the countries. All validation questions of the contractor to NSIs, as well as the countries' answers, are entered in the Validation Tool. For some screenshots, please click [here. Eurostat is currently using the VT version 5.14.0.](#)

- Specific conditions for the execution of the contract

None.

- Confidential data

In accordance with Regulation (EC) No 223/2009 of the European Parliament and of the Council of 11 March 2009 on European statistics (OJ L 87, 31.3.2009, p.164) it is forbidden to use confidential statistical data for purposes other than the tasks expressly set out in the contract for the provision of services and is forbidden to process, disseminate or otherwise make available or use these data in any way whatsoever. These obligations remain in force after the termination of the contract.

Corresponding declaration has to be signed by the contractor (see Annex V of the contract).

The successful tenderer should implement and present in its tender the appropriate management procedures and security controls to avoid any breach of information. The staff working on the project will be required to sign the Eurostat confidentiality agreement. Access to confidential statistical information will only be possible within the premises of Eurostat.

LOT 2: CO-ORDINATION OF THE 2021 AND 2022 PPP PRICE SURVEYS ON CONSTRUCTION

2.1 General information and objectives

Countries are required to carry out price surveys and provide price input data for household consumption, individual government consumption, collective consumption and gross fixed capital formation (investment). Reference (imputed) PPPs are used for NPISH consumption, inventories, and net exports. The source data obtained from the surveys feed into the overall calculation of PPPs.

This lot concerns the co-ordination of the price surveys on construction, which is one of the two surveys on gross fixed capital formation. The other survey is on equipment goods, which is the subject of lot 1.

Construction represents a large share of gross fixed capital formation. It includes construction of residential and non-residential buildings and civil engineering works. Construction PPPs are based on prices for so-called "Bills of Quantities" (BoQs) which are detailed descriptions of fictitious building projects, each consisting of a list of items that have to be priced. The following BoQs are included in the surveys:

- Residential buildings
 - ✓ Detached house
 - ✓ Portuguese house
 - ✓ Nordic house
 - ✓ Apartment
 - ✓ Renovation of a house
- Non-residential buildings
 - ✓ Light industrial building
 - ✓ Office building
- Civil engineering works
 - ✓ Asphalt road
 - ✓ Bridge

As example, the BoQ for the detached house is found [here](#). This Excel file is also the data input sheet.

All countries price all these BoQs, with the exception of the Portuguese house and the Nordic house, from which a country can choose the most representative of the country. The Portuguese house and the Nordic house should not be included in the 2022 survey.

The price survey on construction is carried out on a rolling basis, spread over two years (covering in total approximately 700 items), in the following way:

- Year 1: Detached house, Light industrial building and Bridge
- Year 2: Apartment, Renovation of a house, Office building, and Asphalt road-

In the years that a BoQ is not surveyed in full, countries deliver prices for a subset of the items of the BoQ, the so-called "key items". On the basis of the prices for these key items, the total values of the BoQs are estimated. This implies a total estimated number of items (in total approximately 150 items) to be priced in the "key item" years:

- Year 1: Apartment, Renovation of a house, Office building, and Asphalt road.
- Year 2: Detached house, Light industrial building and Bridge.

This lot concerns the surveys to be carried out in 2021 and 2022. In these surveys, the BoQs are priced as indicated in table 1.

Table 1: Survey cycle construction 2021-2022

	2021	2022
Detached house	fully priced	key items
Portuguese or Nordic house	key items	-
Apartment	key items	fully priced
Renovation of a house	key items	fully priced
Light industrial building	fully priced	key items
Office building	key items	fully priced
Asphalt road	key items	fully priced
Bridge	fully priced	key items

Legend: “-“: not to be included.

The work covers the survey in all 37 countries participating in the exercise (see "General information on all lots") plus some work for Georgia and Ukraine as participants in the ICP through the Eurostat-OECD PPP program.

All data are submitted by countries to Eurostat using the eDAMIS system, Eurostat's Single Entry Point application. This provides a secure data transmission. The contractor will receive the country submissions from the [eDAMIS system](#). Upon arrival (by end of July each year), all data are directly loaded into the central PPP database by the contractor. The survey data are accompanied by a survey report in a standard format (see [here](#)).

The full methodology of the survey is described in chapter 11 of the "[Eurostat-OECD Methodological Manual on Purchasing Power Parities](#)".

The work requires very close cooperation with the NSIs and/or with the experts sub-contracted by the NSIs. All correspondence with the NSIs or their experts has to be documented.

2.2 Volume of the contract

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

- indicatively around 50 person-months (i.e. around 25 person-months per contract);
- up to 14 assistance country missions (i.e. 6 or 7 assistance country missions per contract).

The **estimated** total value is EUR 580,000 for the entire duration of the contract (39 months). The work to be conducted under this call for tender will be covered by 2 overlapping contracts covering work periods of 27 months each: the first contract (starting between 1 September 2020 and 1 October 2020) covers the activities related to the 2021 survey, whereas the second contract (starting between 1 September 2021 and 1 October 2021) covers the activities related to the 2022 survey.

2.3 Tasks and expected results

The contract will include the following activities for 37 countries as well as data gathering and data validation under activity 2 also for Georgia and Ukraine:

Activity 1: Updating Bills of Quantities and selecting key items

This activity includes:

- preparing and presenting a document to the PPP Working Group meeting concerning the organisation of the survey (to be provided at least one month before the meeting);
- analysing the existing BoQs and updating them to modify items or improve item descriptions where found necessary;

- fully updating one of the BoQs to be selected in agreement with Eurostat;
- selecting the key items on the basis of the methodology agreed with Eurostat;
- establishing the survey guidelines and other background material to instruct and guide the countries in the execution of the survey;
- updating the Excel tool for the entering of price observations and other required information by countries;
- advising Eurostat on improvements of PPP methodology in the area of construction;
- contributing to the development of the software tools for the maintenance of the BoQs (see section 2.9) by testing prototypes of new versions and providing suggestions for improvements.

All updates to BoQs, as well as the selection of key items, are to be entered in the on-line Item List Management Tool (ILMT), see section 2.9.

The deliverables for this activity are:

- D1.1 Document (15-20 pages) and PowerPoint presentation (15-20 slides) for the PPP Working Group in November year t-1 (where, t, being the survey year).
- D1.2 The updated BoQs.
- D1.3 List of key items to be priced each year.
- D1.4 Survey guidelines and other background material.
- D1.5 The updated Excel tool for data entry by countries.
- D1.6 Proposals for improvements of the PPP methodology.

Activity 2: Data gathering and validation

This activity includes:

- advising countries – by email, phone or in the country missions – during the price collection, e.g. by explaining item definitions or providing help with entering the data;
- gathering of the survey data from the countries via eDAMIS (see section 2.1), together with their survey reports, and their upload to the PPP database according to the PPP work plan;
- validating of the data using Quaranta tables (see Annex IV of the "[Eurostat-OECD Methodological Manual on Purchasing Power Parities](#)" for an explanation) and any other statistical tools (for example Excel or equivalent);
- communicating with the countries – either on-line in the Validation Tool (see section 2.9), by email, phone or in the country missions – on the quality of the submitted data (checking outliers, discussing plausibility, etc.);
- validation of the construction goods survey data for a list of materials, labour and equipment hire (according to the ICP questionnaire), by evaluating data provided by any of the 37 countries participating in the PPP exercise (plus Georgia and Ukraine). Giving assistance to Eurostat during calculation/validation process by responding to all requests for clarifications or corrections. Eurostat is responsible for the calculation of the PPPs ; contributing to the development of tools for the validation of construction prices by testing prototypes of new versions and providing suggestions for improvements;
- preparing and presenting documents to the PPP Working Group meetings in 2021 and 2022 concerning the results of the survey (to be provided at least one month before each meeting);
- advising Eurostat on improvements of PPP methodology in the area of construction.

Validation includes checking the price and other data provided by the NSIs, as well as an evaluation of the plausibility of the resulting PPPs and a comparison of the results with previous surveys. Validation is an iterative process organised in a number of validation rounds that start and end with the calculation of a Quaranta Table and takes place within the on-line Validation Tool (VT), see section 2.9.

The deliverables for this activity are:

- D2.1 Document (15-20 pages) and PowerPoint presentation (15-20 slides) on the interim stage of validation to be presented to the PPP Working Group in November of the survey year t.
- D2.2 Final validated prices for construction from which reliable and plausible PPPs can be calculated.

D2.3 An overall evaluation report and PowerPoint presentation on the execution of the survey, to be presented to the PPP Working Group of November survey year t+1.

D2.4 Proposals for improvements of the PPP tools and methodology.

Activity 3: Missions to countries

To gather information on countries' construction markets, to discuss survey results and to advise countries in the carrying out of the survey, the contractor shall undertake missions (business trips/country visits) to the countries. To stimulate comparisons of survey results across countries, these missions are organised – to the extent possible – in a way to include two or three countries that are geographically and/or economically close to each other⁴. Each country should be included in a mission every second year. This implies that in 2021, 6 to 7 of these two-day missions are organised while in 2022, 6 to 7 such missions will be organised. The exact mission schedule will be determined annually in consultation with Eurostat. The missions could take into account a direct need for a visit due to particular reasons (for instance, changes in a country's PPP team, specific methodological or data quality related problems, practical issues requiring assistance, etc.). The contractor shall provide Eurostat with a detailed report of each mission, no later than 3 weeks after the end of the mission, listing the conclusions reached and key aspects discussed.

The language requirement for the country visits and the country specific working material is English.

The deliverables for this activity are:

D3 Detailed mission reports (covering information on the country specific markets, survey results and advises in the carrying out of pre-survey and survey).

2.4 Meetings and missions

In addition to the 6 or 7 assistance country missions by contract (initial and renewal) mentioned under activity 3, the following meetings and missions have to be provided for.

Meetings:

- Per contract, a kick-off meeting (maximum duration one day) will be organised in Luxembourg at Eurostat's premises soon after the start of the execution of the tasks.
- Per contract, three progress meetings (maximum duration one day each) with Eurostat staff will be held in Luxembourg, in Eurostat's premises, or with telephone or videoconference equipment, if agreed between all participants.

For these meetings the contractor will prepare discussion materials to be sent to Eurostat at least three working days prior to the meetings. The minutes of each of these meetings will be prepared by the contractor and sent to Eurostat for approval at the latest five working days after the meeting.

Missions:

- Participation in the PPP Working Group (maximum duration one day) in 2020, 2021 and 2022 at the Commission premises in Luxembourg.

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

2.5 Duration and timetable

The contract is expected to be signed in the 3rd quarter of 2020.

Execution of the tasks is to start on the date of entry into force of the contract. The maximal overall duration of the work will be 39 months, divided into 2 overlapping contracts (original + up to 1 optional renewal) covering work periods of 27 months each: under the first contract, the activities related to the 2021 survey are covered, whereas the second contract (starting between 1 September and 1 October 2021) covers the activities related to the 2022 survey.

⁴For example: in 2020 a meeting will be held in Hungary, to which also Slovenia and Croatia will participate.

Implementation of each contract, whether total or partial, following the initial contract, is subject to budgetary constraints and/or satisfaction with the quality of the services rendered under the previous contract and/or unilateral discretionary decision of the Commission. The tenderer awarded the contract must carry out the contracts following the initial one if the Commission decides to sign these following contracts.

See table 2 for an overview of the content of each of the surveys and table 3 for an overview of the activities included in each contract.

Table 2: Surveys included in this lot.

Contract	Survey year	Year 2020		Year 2021		Year 2022		Year 2023	
		First half	Second half	First half	Second half	First half	Second half	First half	Second half
1	2021		Preparation at PPP WG	Updating BoQs and price collection	Validation	Validation	Evaluation at PPP WG		
2	2022				Preparation at PPP WG	Updating BoQs and price collection	Validation	Validation	Evaluation at PPP WG

The work has to be carried out in a very tight timeframe according to the PPP work plan of Eurostat. The PPP Working Group, consisting of the countries participating in the Eurostat PPP programme and Eurostat, decides on the work plan for the entire PPP programme of the next calendar year every autumn. These decisions will form part of the contracts under this call for tender. As an example, the PPP work plan for the calendar year 2020 can be found [here](#).

The typical construction survey process (for the survey of year t) will look as follows:

- September – October t-1: preparation of the documents for the PPP Working Group meeting;
- November t-1: PPP Working Group meeting which starts the survey process by agreeing on the overall survey design and timetable;
- December t-1 – April t: updating of the BoQs by the contractor (following consultations with the countries), selection of key items and preparation of survey material, questionnaires, guidelines, etc.;
- May – July t: price collection by the countries for both the fully priced BoQs and the key items;
- July t: submission of the survey data and survey reports by the countries, via eDAMIS;
- August t – November t: validation by the contractor, in co-operation with the countries, leading to presentation of interim results to the PPP Working Group in November t;
- November t – April t+1: continued validation until final results are reached;
- November t+1: evaluation of the survey at the PPP Working Group meeting

During the kick-off meeting, the contractor and Eurostat discuss, based on the contract, the concrete work programme for this lot and the timeline for the entire contract period.

Table 3: Indicative time schedule for the contract for survey of year t

	Activity 1 Updating Bills of Quantities and selecting key items	Activity 2 Data gathering and validation	Activity 3 Missions to countries	Meetings
September t-1	X			Kick-off meeting – R
October	X – D1.1			
November	X			PPP Working Group
December	X			
January t	X			
February	X			Progress meeting – R
March	X			
April	X – D1.2, D1.3, D1.4, D1.5, D1.6			
May		X		
June		X		
July		X		
August		X		
September		X		
October		X – D2.1		
November		X		
December		X		
January t+1		X		
February		X		
March		X		
April		X – D2.2		
May		X		Progress meeting – R
June		X		
July		X		
August		X		
September		X		
October		X – D2.3, D2.4		
November		X		PPP Working Group

Legend:

- X: task's lifetime.
- D: deliverables D: deliverables (NB: Deliverables D3 - detailed report of the mission, no later than 3 weeks after the end of each mission).
- R: report of the meeting.

A detailed timetable should be provided by the tenderer in the tender. In addition, the contractor is requested to fill in Annex 9 “Compulsory reply form - checklist for deliverables”.

2.6 Minimum requirements

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

- Include a detailed plan in line with the above overall indicative timetable of the activities envisaged to prepare the 2021 and 2022 survey documentation and to validate data of all 37 participating countries participating in the PPP exercise.
- In the tender, the tenderer shall specify how the updating Bills of Quantities and selecting key items, data gathering and validation as well as missions will be organised.

Furthermore, the tender shall comply with applicable environmental, social and labour legislation established under Union legislation, national legislation, collective agreements or the applicable international social and environmental conventions listed in Annex X to Directive 2014/24/EU⁵.

2.7 Technical implementation reports

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

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

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

- Twenty seven months after the starting date of the execution of the tasks referred to in Article I.3 of the contract, the contractor shall provide, as soon as possible and within sixty days of completion of the tasks referred to in 2.3 of this tender specification, a final technical implementation report relating to the execution of the contract describing the results obtained and the means which were implemented for the execution of the contract.

These technical implementation reports shall accompany the corresponding invoice.

All important communication with the NSIs has to be documented and attached to the reports.

All reporting has to be done in English and the reports must be proof read by a person with English level C2.

2.8 Assessment of results

The progress of work under this project shall be monitored and followed by means of regular communication either by e-mail, telephone, videoconferences or meetings between the contractor and Eurostat.

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

- the quality of the BoQs: clear and unambiguous item descriptions, reflecting up-to-date building techniques supported by technical plans/specifications for construction objects as defined under activity 1;
- the quality of the validation, evaluated by numbers of validation questions asked in the PPP tool and induced data changes by countries in the PPP tool as defined under activity 2 (taking into account that the number of validation questions depend on the quality of the countries' input data);
- the clarity of presentation of deliverables and reports and the quality of analyses therein, including the quality of conclusions and recommendations done for process improvement;
- the respect of deadlines.

2.9 Specific conditions

- Resources made available by Eurostat

Eurostat will provide and maintain all the electronic tools necessary to carry out the work, except the Excel tool to enter price observations, which is to be maintained by the contractor. All data are stored in

⁵ OJ L 94 of 28.03.2014, p. 65

the central PPP Database managed by Eurostat. All tools communicate with the central database. This includes in particular:

- The Item List Management Tool (ILMT): a web application that manages the entire process of creating item lists. As regards the construction survey, this tool is used to enter the coding and definitions of the BoQs in the central database. For some screenshots, please click [here](#). Eurostat is currently using the ILMT version 10.14.2.
- The Validation Tool (VT): a web application which is used to visualise the countries' data, to validate them using Quaranta Tables and to communicate with the countries. All validation questions of the contractor to NSIs, as well as the countries' answers, are entered in the Validation Tool. For some screenshots, please click [here](#). Eurostat is currently using the VT version 5.14.0.

- Specific conditions for the execution of the contract

None.

- Confidential data

In accordance with Regulation (EC) No 223/2009 of the European Parliament and of the Council of 11 March 2009 on European statistics (OJ L 87, 31.3.2009, p.164) it is forbidden to use confidential statistical data for purposes other than the tasks expressly set out in the contract for the provision of services and is forbidden to process, disseminate or otherwise make available or use these data in any way whatsoever. These obligations remain in force after the termination of the contract.

Corresponding declaration has to be signed by the contractor (see Annex V of the contract).

The successful tenderer should implement and present in its tender the appropriate management procedures and security controls to avoid any breach of information. The staff working on the project will be required to sign the Eurostat confidentiality agreement. Access to confidential statistical information will only be possible within the premises of Eurostat.

LOT 3: CO-ORDINATION OF THE 2021-2024 PPP PRICE SURVEYS ON HOSPITAL SERVICES

2.1 General information and objectives

Countries are required to carry out price surveys and provide price input data for household consumption, individual government consumption, collective consumption and gross fixed capital formation (investment). Reference (imputed) PPPs are used for NPISH consumption, inventories, and net exports. The source data obtained from the surveys feed into the overall calculation of PPPs.

This lot concerns the co-ordination of the price surveys on hospital services. Hospital services represent a large share of expenditure on health. Each year prices are collected for the three previous years, allowing for revisions of the data provided in earlier years.

The work covers all 37 participating countries (see "General information on all lots") for the surveys conducted in the years 2021 to 2024.

Countries collect prices and other data for a set of around 40 well-defined medical and surgical services ("case types") performed in general hospitals. The full methodology and results for 2011 are described in the [joint OECD/Eurostat Working Paper](#): "*Comparing hospitals and health prices and volumes internationally: results of a Eurostat/OECD project*".

As an example, the last questionnaire (and guidelines) used for this survey can be found [here](#).

All data are submitted by countries to Eurostat using the eDAMIS system, Eurostat's Single Entry Point application. This provides a secure data transmission. The contractor will receive the country submissions from the [eDAMIS system](#). Upon arrival (by end of August each year), all data are loaded into the central PPP database by the contractor.

The work requires very close cooperation with the NSIs and/or with the experts sub-contracted by the NSIs. All correspondence with the NSIs or their experts has to be documented.

2.2 Volume of the contract

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

- indicatively around 24 person-months (i.e. around 6 person-months per contract);
- Up to 20 country missions to one of the countries covered by this project (i.e. 5 country missions per year).

The **estimated** total value is EUR 300,000 for the entire duration of the contract (48 months). The work to be conducted under this call for tender will be covered by 4 one-year contracts, each contract covering one survey starting with the 2021 survey.

2.3 Tasks and expected results

Each contract will include the following activities for the survey covered:

Activity 1: Establishment of the list of case types to be priced

This activity includes:

- establishing the final survey list of well-defined medical and surgical services (the case types), including detailed definitions;
- establishing the survey guidelines and other background material to instruct and guide the countries in the execution of the survey;
- updating the Excel file for the entering of price observations and other required information by countries.

An example of the Excel file can be found [here](#).

A list of case types already exists, but it needs to be updated each year to take into account developments in the health sector and/or feedback received from countries.

All work on the list of case types is carried out in the on-line Item List Management Tool (ILMT), see section 2.9.

The deliverables for this activity are:

- D1.1 Final survey list of case types.
- D1.2 Survey guidelines and other background material.
- D1.3 The updated Excel file for data entry by countries.

Activity 2: Data gathering and validation

This activity includes:

- advising countries – by email, phone or in the country missions – during the price collection, e.g. by explaining case type definitions, pricing rules, or providing help with the use of the Excel file for data entry;
- gathering of the data from the countries via eDAMIS (see section 2.1) and their upload to the PPP database according to the PPP work plan;
- validation of the data using Quaranta tables (see Annex IV of the "[Eurostat-OECD Methodological Manual on Purchasing Power Parities](#)" for an explanation) and any other statistical tools (for example Excel or equivalent);
- communicating with the countries – either on-line in the Validation Tool (see section 2.9), by email, phone or in the country missions – on the quality of the submitted data (e.g. checking outliers, discussing plausibility, etc...);
- contributing to the development of validation tools for hospital services by testing prototypes of new versions and providing suggestions for improvements;
- advising Eurostat on improvements of PPP methodology in the area of hospital services;
- preparing and presenting documents to the PPP Working Group meeting in November each year describing the process and final results of the survey as well as proposals for improvements (draft to be provided at least one month before the meeting);

Validation includes checking the price and other data provided by the NSIs, as well as an evaluation of the plausibility of the resulting PPPs and a comparison of the results with previous surveys. Validation is an iterative process organised in a number of validation rounds that start and end with the calculation of a Quaranta Table and takes place within the on-line Validation Tool (VT), see section 2.9.

The deliverables for this activity are:

- D2.1 Document (15-20 pages) and PowerPoint presentation (15-20 slides) on the process and final results of the survey as well as proposals for improvements to be implemented in the next survey, to be presented to the PPP Working Group in November each year.
- D2.2 Final validated prices for hospital services from which reliable and plausible PPPs can be calculated.

Activity 3: Missions to countries

To gather information on countries' health systems, to advise countries in the carrying out of the survey and to discuss survey results, the contractor shall undertake five missions (business trips/country visits) of one day to selected countries (agreed with Eurostat) during each contract period. The contractor shall provide Eurostat with a detailed report of the mission, no later than 3 weeks after the end of the mission, listing the key aspects discussed and conclusions reached. Countries will be selected together with Eurostat and will take account of specific needs in the countries.

The language requirement for the country visits and the country specific working material is English.

The deliverables for this activity are:

D3 Detailed mission reports covering information on the country specific issues, survey results and advises in the carrying out of pre-survey and survey.

2.4 Meetings and missions

In addition to the five missions per year mentioned under activity 3 (20 missions for the entire duration of the contract of 48 months), the following meetings and missions have to be provided for.

Meetings for each 12 months contract:

- A kick-off meeting (maximum duration one day) will be organised in Luxembourg at Eurostat's premises soon after the start of the execution of the tasks.
- One progress meeting in September/October (maximum duration one day each) with Eurostat staff will be held in Luxembourg, at Eurostat's premises.

For these meetings the contractor will prepare discussion materials to be sent to Eurostat at least three working days prior to the meetings. The minutes of each of these meetings will be prepared by the contractor and sent to Eurostat for approval at the latest two weeks after the meeting.

Missions:

- Participation in the PPP Working Group (maximum duration one day) in 2021, 2022, 2023 and 2024 at the Commission premises in Luxembourg.

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

2.5 Duration and timetable

The contract is expected to be signed in the 3rd quarter of 2020.

Execution of the tasks is to start on 4 January 2021. The maximal overall duration of the work will be 48 months, divided into 4 contracts (original + up to 3 optional renewals) covering work periods of 12 months each.

Implementation of each contract, whether total or partial, following the initial contract, is subject to budgetary constraints and/or satisfaction with the quality of the services rendered under the previous contract and/or unilateral discretionary decision of the Commission. The tenderer awarded the contract must carry out the contracts following the initial one if the Commission decides to sign these following contracts.

The work has to be carried out in a very tight timeframe according to the PPP work plan of Eurostat. The PPP Working Group, consisting of the countries participating in the Eurostat PPP programme and Eurostat, decides on the work plan for the entire PPP programme of the next calendar year every autumn. These decisions will form part of the contracts under this call for tender. As an example, the PPP work plan for the calendar year 2020 can be found [here](#).

The process and approximate timetable for the hospital services survey conducted in year t are as follows:

- January t – February t: preparation of the final list of case types and other survey material by the contractor;
- March t – August t: price collection by the countries; provision of assistance by the contractor;
- August t: submission of the survey data and survey reports by the countries, via eDAMIS;
- September t – November t: validation by the contractor, in co-operation with the countries, leading to presentation of final results to the PPP Working Group in November t.

During the kick-off meeting, the contractor and Eurostat discuss, based on the contract, the concrete work programme and the timeline for the entire contract period.

The overall indicative timetable is the following:

	Activity 1 Establishment of the list of case types to be priced	Activity 2 Data gathering and validation	Activity 3 Missions to countries	Meetings
January	X			Kick-off meeting – R
February	X – D1.1, D1.2, D1.3			
March		X	X - D3 Five times	
April		X		
May		X		
June		X		
July		X		
August		X		
September		X		
October		X		Progress meeting – R
November		X – D2.1, D2.2		
December				

Legend:

- X – task's lifetime
- D – deliverables
- R – report of the meeting

A detailed timetable should be provided by the tenderer in the offer. In addition, the contractor is requested to fill in Annex 9 “Compulsory reply form - checklist for deliverables” of the contract.

2.6 Minimum requirements

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

- Preparation of hospital survey material for 2021, 2022, 2023 and 2024 according to the process and timetable defined in these specifications
- The validation of data will cover all participating countries.
- The contractor shall undertake 20 assistance missions to countries (5 per year).

Furthermore, the tender shall comply with applicable environmental, social and labour legislation established under Union legislation, national legislation, collective agreements or the applicable international social and environmental conventions listed in Annex X to Directive 2014/24/EU⁶.

2.7 Technical implementation reports

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

⁶ OJ L 94 of 28.03.2014, p. 65

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

- Twelve months after the starting date of the execution of the tasks referred to in Article I.3 of the contract, the contractor shall provide, as soon as possible and within sixty days of completion of the tasks referred to in 2.3 of this tender specification, a final technical implementation report relating to the execution of the contract describing the results obtained and the means which were implemented for the execution of the contract.

These technical implementation reports shall accompany the corresponding invoice.

All important communication with the NSIs has to be documented and attached to the reports.

All reporting has to be done in English and the reports must be proof read by a person with English level C2.

2.8 Assessment of results

The progress of work under this project shall be monitored and followed by means of regular communication either by e-mail, telephone, videoconferences or meetings between the contractor and Eurostat.

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

- the quality of the lists of case types: well-defined case types, comparable and representative for the participating countries as specified under activity 1;
- the quality of the validation, evaluated by numbers of validation questions asked in the PPP tool and induced data changes by countries in the PPP tool as specified under activity 2 (taking into account that the number of validation questions depends on the quality of the countries' input data);
- the clarity of presentation of deliverables and reports and the quality of analyses therein, including the quality of conclusions and recommendations done for process improvement;
- the respect of deadlines.

2.9 Specific conditions

- Resources made available by Eurostat

Eurostat will provide and maintain all the electronic tools necessary to carry out the work, except the Excel tool to enter price observations, which is to be maintained by the contractor. All data are stored in the central PPP Database managed by Eurostat. All tools communicate with the central database. This includes in particular:

- The Item List Management Tool (ILMT): a web application that manages the entire process of creating item lists. As regards the hospital services survey, this tool is used to enter the coding and definitions of the case types in the central database. For some screenshots, please click [here](#). Eurostat is currently using the ILMT version 10.14.2.
- The Validation Tool (VT): a web application which is used to visualise the countries' data, to validate them using Quaranta Tables and to communicate with the countries. All validation questions of the contractor to NSIs, as well as the countries' answers, are entered in the Validation Tool. For some screenshots, please click [here](#). Eurostat is currently using the VT version 5.14.0.

- Specific conditions for the execution of the contract

None.

- Confidential data

In accordance with Regulation (EC) No 223/2009 of the European Parliament and of the Council of 11 March 2009 on European statistics (OJ L 87, 31.3.2009, p.164) it is forbidden to use confidential statistical data for purposes other than the tasks expressly set out in the contract for the provision of services and is forbidden to process, disseminate or otherwise make available or use these data in any way whatsoever. These obligations remain in force after the termination of the contract.

Corresponding declaration has to be signed by the contractor (see Annex V of the contract).

The successful tenderer should implement and present in its tender the appropriate management procedures and security controls to avoid any breach of information. The staff working on the project will be required to sign the Eurostat confidentiality agreement. Access to confidential statistical information will only be possible within the premises of Eurostat.

SECTION 3 INFORMATION ON THE CONTRACT

3.1 General information

- The submission of the tender implies acceptance of all the terms and conditions set out in the procurement documents (contract notice, invitation to tender, tender specifications, draft contract).
- Tenderers need to take full account of the provisions of the Draft contract as the latter will define and govern the contractual relationship(s) to be established between the *Contracting authority* and the successful tenderer(s). Special attention is to be paid to the provisions specifying the rights and obligations of the contractor, in particular those on payments, performance of the contract, confidentiality, and checks and audits
- **The submitted tender is binding on the tenderer to whom the contract is awarded for the duration of the contract.**

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

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

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

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

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

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

3.2 Payments

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

Payments under the contract will be made in accordance with Articles I.5 and II.21 of the draft contract in Annex 7.

3.3 Replacement of persons assigned to carry out the work

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

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

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

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

3.4 Personal data, intellectual property rights and electronic exchange system

3.4.1 Personal data

If processing your reply to the invitation to tender involves the recording and processing of personal data (such as your name, address and CV), such data will be processed Regulation (EU) 2018/1725 of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC, OJ L 295/39, 21.11.2018. Unless indicated otherwise, your replies to the questions and any personal data requested are required to evaluate your tender in accordance with the specifications of the invitation to tender and will be processed solely for that purpose by the unit involved. Details concerning the processing of your personal data are available at: https://ec.europa.eu/info/departments/data-protection-officer_en

All personal data may be registered in the Early Detection and Exclusion System (EDES) if you are in one of the situations mentioned in Article 136 of the Financial Regulation⁷. For more information, see the Privacy Statement on http://ec.europa.eu/budget/explained/management/protecting/protect_en.cfm

3.4.2 Intellectual property rights

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

3.5 Electronic exchange and E-prior

For all exchanges with the contractor during the implementation of the contract as well as for future possible subsequent proceedings for the purposes of EDES ([European Union's Early Detection and Exclusion System](#)) the *Contracting authority* may use an electronic exchange system meeting the requirements of Article 148 of [Regulation \(EU, Euratom\) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union](#). At the request of the *Contracting authority* the use of such a system shall become mandatory for the contractor(s) at no additional cost for the *Contracting authority*. Details on specifications, access, terms and conditions of use will be provided in advance.

The execution of the contract between the Commission and the contractors could be automated by the use of the following application: e-Invoicing, e-Catalogue, e-Ordering, e-Request based on an electronic exchange platform (e-Prior). Information on the technical and functional characteristics of the above-mentioned system can be found at: <https://webgate.ec.europa.eu/fpfi/wikis/x/8pBsAQ>

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

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

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

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

⁷ Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012. <https://eur-lex.europa.eu/legal-content/EN/TEXT/?uri=OJ:L:2018:193:TOC>

SECTION 4 INFORMATION ON THE TENDER PROCEDURE

4.1 General information

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

– Financial Regulation - Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012.

The *Contracting authority* has chosen to award the contract resulting from this call for tenders through an open procedure pursuant to Article 164(1) (a) of the Financial Regulation. In an open procedure, any interested economic operator (any natural or legal person who offers to supply products, provide services or execute works) may submit a tender (see 4.2).

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

The Financial Regulation incorporates the rules from Directive 2014/24/EU⁸, hereinafter referred to as “the Directive” and Directive 2014/23/EU on concessions⁹.

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

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

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

4.2 Who may participate in this invitation to tender

Participation in this invitation to tender (including each member of a group of economic operators if applicable) is open on equal terms to all natural and legal persons coming within the scope of the Treaties, as well as to international organisations.

For British tenderers:

Please be aware that following the entry into force of the EU-UK Withdrawal Agreement¹⁰ on 1 February 2020 and in particular Articles 127(6), 137 and 138, the references to natural or legal persons residing or established in a Member State of the European Union are to be understood as including natural or legal persons residing or established in the United Kingdom. UK residents and entities are therefore eligible to participate under this call.

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

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

⁸ OJ L 94, 28.03.2014, p. 65, see <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32014L0024&from=EN>

⁹ OJ L 94, 28.03.2014, p. 1, see <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32014L0023&from=EN>

¹⁰ Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland from the European Union and the European Atomic Energy Community

- has ratified the plurilateral Agreement on Government Procurement (GPA)¹¹ concluded within the World Trade Organisation (WTO), under the terms of that Agreement.

The rules on access to procurement do not apply to subcontractors. Subcontracting may not be used with the intent to circumvent the rules on access to procurement.

Economic operators can submit a tender either as a sole tenderer or as a group of tenderers. In either case, subcontracting is permitted.

In order to fulfil the selection criteria set out in Section 4.5.1.B the tenderer can rely on the capacities of subcontractors or other entities.

The role of each entity involved in a tender (hereafter referred to as *involved entity*) must be clearly specified: sole tenderer, member of a group or Group leader, subcontractor or an entity on whose capacities the tenderer relies to fulfil the selection criteria¹². This applies also, where the *involved entities* belong to the same economic group.

4.2.1 Joint tenders

A **joint tender** is a situation where a tender is submitted by a group (with or without legal form) of economic operators (natural or legal persons) regardless of the link they have between them. The group as a whole is considered a tenderer¹³. Joint tender may include subcontractors in addition to the members of the group.

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

- Group members in joint tenders may submit only one tender for a single contract.
- Group members must appoint a *Group leader* and a single point of contact authorised to act on their behalf in connection with the submission of the tender and all relevant questions, clarification requests, notifications, etc., that may be received during the evaluation, award and until the contact signature. The model power of attorney attached in **Annex 4** is to be used.

The joint tender must clearly indicate the role and tasks of each member and of the *Group leader* who will act as the *Contracting authority's* contact point for the contract's administrative or financial aspects and operational management. The *Group leader* will have full authority to bind the group and each of its members during contract execution. If the joint tender is successful, the *Contracting authority* shall sign the contract with the Group leader, authorised by the other members to sign the contract on their behalf via power of attorney drawn up in the model attached in **Annex 4**.

Changes in the composition of the group during the procurement procedure (after the submission deadline and before contract signature) shall lead to rejection of the tender except in case of:

- a merger or takeover of a member of the group (universal succession), provided that the new entity has access to procurement and is not in an exclusion situation, or
- exclusion or rejection of a member by the Contracting authority where the member has no access to procurement is in an exclusion situation or does not meet a relevant selection criterion.

In either case the selection criteria must be still fulfilled by the group and the terms of the originally submitted tender may not be altered substantially, i.e. all the tasks assigned to the excluded/rejected entity must be taken over by the group, the change must not make the tender non-compliant with the Tender specifications, and the evaluation of award criteria of the originally submitted tender may not be modified

The documents required and listed in the present specifications must be supplied by every member of the grouping (see 4.4); the checklist in Annex 8 will help verifying the level of information to be provided according to the role of each entity in the tender.

¹¹ https://www.wto.org/english/tratop_e/gp_gpa_e.htm.

¹² Such an entity is not considered a subcontractor unless the entity is relied on to fulfill the technical and professional selection criteria (see Section 4.2.3).

¹³ References to *tenderer* or *tenderers* in this document shall be understood as covering both sole tenderers and groups of economic operators submitting a joint tender.

The Submission Report has to be signed by the joint tender leader (hand or electronic signature, as explained the letter of invitation to tender, under §1. Submission of tenders)

4.2.2 Subcontracting

Subcontracting is the situation where the contractor enters into legal commitments with other economic operators, which will perform part of the contract on its behalf. The contractor retains full liability towards the *Contracting authority* for performance of the contract as a whole.

The following shall not be considered subcontracting:

- a) Use of workers posted to the contractor by another company owned by the same group and established in a Member State (“intra-group posting” as defined by Article 1, 3, (b) of [Directive 96/71/EC concerning the posting of workers in the framework of the provision of services](#)).
- b) Use of workers hired out to the contractor by a temporary employment undertaking or placement agency established in a Member State (“hiring out of workers” as defined by Article 1, 3, (c) of [Directive 96/71/EC concerning the posting of workers in the framework of the provision of services](#)).
- c) Use of workers temporarily transferred to the contractor from an undertaking established outside the territory of a Member State and that belongs to the same group (“intra-corporate transfer” as defined by Article 3, (b) of [Directive 2014/66/EU on the conditions of entry and residence of third-country nationals in the framework of an intra-corporate transfer](#)).
- d) Use of staff without employment contract (“self-employed persons working for the contractor”) to perform substantially the same tasks as the staff with employment contract (“employees”), without the tasks of the self-employed persons being particular well-defined parts of the contract.
- e) Use of suppliers and/or transporters by the contractor, in order to perform the contract at the place of performance, unless the economic activities of the suppliers and/or the transporting services are within the subject of this call for tender.
- f) Performance of part of the contract by members of an EEIG (European Economic Interest Grouping), when the EEIG is itself a contractor or a group member.

The persons mentioned in points a), b), c) and d) above will be considered as “personnel” of the contractor as defined in the contract.

All contractual tasks may be subcontracted unless the *Technical specifications* expressly reserve the execution of certain critical tasks to the sole tenderer itself, or in case of a joint tender, to a member of the group.

By filling in the form available in Annex 2, tenderers are required to give an indication of the proportion of the contract that they intend to subcontract, as well as to identify and describe briefly the envisaged contractual roles/tasks of subcontractors.

Tenderers are required to identify all subcontractors.

Any subcontractor must provide the tenderer with a commitment letter drawn up in the model attached in *Annex 3.1* and signed by its authorised representative

Changes concerning subcontractors identified in the tender (withdrawal/replacement of a subcontractor, additional subcontracting) during the procurement procedure (after the submission deadline and before contract signature) require the prior written approval of the *Contracting authority* subject to the following verifications:

- any new subcontractor is not in an exclusion situation;
- the tenderer still fulfils the selection criteria and the new subcontractor fulfils the selection criteria applicable to it individually, if any;
- the terms of the originally submitted tender are not altered substantially, i.e. all the tasks assigned to the former subcontractor are taken over by another involved entity, the change does not make the tender non-compliant with the Tender specifications, and the evaluation of award criteria of the originally submitted tender is not modified.

Subcontracting to subcontractors identified in a tender that was accepted by the *Contracting authority* and resulted in a signed contract, is considered authorised.

If certain tasks provided for in the contract are entrusted to subcontractors, the Contractor shall remain bound by its contractual obligations to the Commission under the Contract and shall be solely responsible for the performance of the contract (see Article II. 10 of the draft contract in Annex 7).

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

4.2.3 Entities on whose capacities the tenderer relies to fulfil the selection criteria

In order to fulfil the selection criteria a tenderer may also rely on the capacities of other entities, regardless of the legal nature of the links it has with them. It must in that case prove that it will have at its disposal the resources necessary for the performance of the contract by producing a commitment letter in the model attached in **Annex 3.2**, signed by the authorised representative of such an entity, and the supporting evidence that those other entities have the respective resources.

If the contract is awarded to a tenderer intending to rely on another entity to meet the minimum levels of economic and financial capacity, the *Contracting authority* may require the entity to sign the contract or, alternatively, to provide a joint and several first-call financial guarantee for the performance of the contract.

With regard to technical and professional selection criteria, a tenderer may only rely on the capacities of other entities where the latter will perform the works or services for which these capacities are required (i.e. the latter will assume the role of subcontractors).

☞ Relying on the capacities of other entities is only necessary when the capacity of the tenderer is not sufficient to fulfil the required minimum levels of capacity. Abstract commitments that other entities will put resources at the disposal of the tenderer will be disregarded.

4.3 How to send a tender

4.3.1 General Information

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

Tenders must be submitted exclusively via the electronic submission system (e-Submission) available from the below website (see instructions in the e-submission Quick Guide¹⁴). Tenders submitted in any other way (e.g. e-mail or by letter) will be disregarded.

<https://etendering.ted.europa.eu/cft/cft-display.html?cftId=6031>

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

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

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

¹⁴ For detailed instructions on how to submit a tender please consult the e-Submission Quick Guide available at: https://webgate.ec.europa.eu/digit/opsys/esubmission/assets/documents/manual/quickGuide_en.pdf.

The supported browsers, file types, size of attachments and other system requirements can be consulted at: <https://webgate.ec.europa.eu/fpfis/wikis/x/f6dqEg>. In case of technical problems, please contact the e-Submission Helpdesk (see contact details in the e-Submission Quick Guide) as soon as possible.

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

Make sure you submit your tender on time: you are advised to start completing your tender early. To avoid any complications with regard to late receipt/non receipt of tenders within the deadline, please ensure that you submit your tender several hours before the deadline. A tender received after the deadline indicated in the procurement documents will be rejected.

In order to help tenderers presenting a tender, a checklist of the documents to be submitted in the e-Submission application is provided in annex 8.

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

4.3.2 Date and place of opening of the tenders

Tenders will be opened in public at the following address:

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

The exact date, time and meeting room of the opening session are indicated under Heading IV.2.7 of the contract notice.

A maximum of two representatives per tender may attend the opening session. For organisational and security reasons the request to attend must comply with the following:

- it must contain the full name, date of birth, nationality and ID or passport number of the representative(s)¹⁵
- it must be signed by an authorised officer of the tenderer
- it must be sent by e-mail at least two working days in advance to: ESTAT-FINANCIAL-CELL-DIR-C-D@ec.europa.eu.

The representative(s) will be required to present the tender reception confirmation generated by e-Submission and to sign an attendance sheet. The contracting authority reserves the right to refuse access to its premises if the above information or the tender reception confirmation are not provided as required.

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

4.3.3 Contact with Eurostat

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

- **On the tenderers' initiative:** in order (and only then) to clarify the nature of the contract. Any request for additional information must be made in writing only through the above TED e-Tendering website in the "Questions & answers" tab, by clicking "Create a question" (registration on TED e-Tendering is required to be able to create and submit a question).
<https://etendering.ted.europa.eu/cft/cft-display.html?cftId=6031>
- The Contracting Authority is not bound to reply to requests for additional information made less than six working days before the deadline for receipt of tenders. Provided it has been requested in good time, such additional information will be supplied simultaneously to all economic operators through the e-Tendering website (<https://etendering.ted.europa.eu/cft/cft-display.html?cftId=6031>) no later than six days before the deadline for the receipt of tenders.

¹⁵ This data is necessary to ensure access to Commission buildings. Details concerning the processing of personal data for visitors to the European Commission are available in the privacy statement at: https://ec.europa.eu/info/files/data-protection-notice-visitors-european-commission_en

- **The website will be updated regularly and it is your responsibility to check for updates and modifications during the submission period.**
- **On the initiative of the Contracting Authority**: in order to inform all interested parties of the existence of an error, a lack of precision, an omission or any other type of defect in the documents relating to the invitation to tender by supplying information on the e-Tendering website address: <https://etendering.ted.europa.eu/cft/cft-display.html?cftId=6031>

After the tenders have been opened, contact may be permitted only on the initiative of the Contracting Authority, where some clarification is required in connection with a tender, or if obvious clerical errors in the tender must be corrected, provided this does not lead to substantial changes to the terms of the submitted tender.

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

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

ESTAT FINANCIAL CELL DIR C-D
Eurostat
Office BECH E4/820
European Commission
L-2920 Luxembourg
E-mail: estat-financial-cell-dir-c-d@ec.europa.eu

4.3.4 Period of validity of the tender

Tenders must be firm and not be subject to revision for the duration of the work. The tender must remain valid for a period as indicated under point IV.2.6 of the contract notice following the closing date for receipt of the tenders. Where the initial contract is stated to be renewable, the tender will remain valid for such renewals. Upon renewals of contracts, the Commission reserves the right to request updated forms for exclusion and selection criteria (see item 4.4 below). The contract(s) will be signed within the validity period, during which the tenderer must continue to meet all the requirements set in the exclusion, selection and award criteria. If the situation concerning these requirements has been altered in the period that has elapsed since the tender in question was submitted, any changes must be reported immediately and at the tenderer's own initiative to the Commission.

4.3.5 Signature policy: how can documents be signed?

Where a document needs to be signed, the signature must be either hand-written, a qualified electronic signature or an advanced electronic signature based on a qualified certificate as defined in [Regulation \(EU\) No 910/2014 on electronic identification and trust services for electronic transactions in the internal market \(the eIDAS Regulation\)](#).

All documents must be signed by the signatories (when they are individuals) or by their duly authorised representatives.

For the following documents, when signed by representatives, tenderers must provide evidence for the delegation of the authorisation to sign:

- The submission report;
- The Declaration on Honour of the tenderer (in case of joint tender – the Declarations on Honour of all group members);
- (If applicable – in the case of joint tender) the power(s) of attorney drawn up using the model attached in **Annex 4**).

The delegation of the authorisation to sign on behalf of the signatories (including, in the case of proxy(-ies), the chain of authorisations) must be evidenced by appropriate written evidence (copy of the notice of appointment of the persons authorised to represent the legal entity in signing contracts (together or alone), or a copy of the publication of such appointment if the legislation which applies to signatory requires such publication or a power of attorney). A document that the Contracting authority can access on a national database free of charge does not need to be submitted if the Contracting authority is

provided with the exact internet link and, if applicable, the necessary identification data to retrieve the document.

4.3.6 Confidentiality of tenders: what information and under what conditions can be disclosed?

Once the *Contracting authority* has opened a tender, it becomes its property and shall be treated confidentially, subject to the following:

- For the purposes of evaluating the tender and, if applicable, implementing the contract, performing audits, benchmarking, etc., the *Contracting authority* is entitled to make available (any part of) the tender to its staff and the staff of other Union institutions, agencies and bodies, as well to other persons and entities working for the *Contracting authority* or cooperating with it, including contractors or subcontractors and their staff provided that they are bound by an obligation of confidentiality.
- After the signature of the award decision tenderers whose tenders were received in accordance with the submission modalities, who have access to procurement, who are not found to be in an exclusion situation referred to in Article 136(1) of the FR, who are not rejected under Article 141 of the FR, whose tenders are not found to be incompliant with the procurement documents, and who make a request in writing will be notified of the name of the tenderer to whom the contract is awarded, the characteristics and relative advantages of the successful tender and the price of the offer and/or contract value. The *Contracting authority* may decide to withhold certain information that it assesses as being confidential, in particular where its release would prejudice the legitimate commercial interests of economic operators or might distort fair competition between them. Such information may include, without being limited to, confidential aspects of tenders such as unit prices included in the financial offer, technical or trade secrets¹⁶.
- The *Contracting authority* may disclose the submitted tender in the context of a request for public access to documents, or in other cases where the applicable law requires its disclosure. Unless there is an overriding public interest in disclosure¹⁷, the *Contracting authority* may refuse to provide full access to the submitted tender, redacting the parts (if any) that contain confidential information, the disclosure of which would undermine the protection of commercial interests of the tenderer, including intellectual property.

✎ The *Contracting authority* will disregard general statements that the whole tender or substantial parts of it contain confidential information. Tenderers need to mark clearly the information they consider confidential and explain why it may not be disclosed. The *Contracting authority* reserves the right to make its own assessment of the confidential nature of any information contained in the tender.

4.4 Structure of the tender

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

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

- a) Identification and information on the composition of the tenderer (section 4.4.1);
- b) Information regarding the exclusion and selection criteria (4.4.2 and 4.4.3).

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

(3) Submission report – you will need to provide the signed submission report (4.4.6)

¹⁶ For the definition of trade secrets please see Article 2 (1) of DIRECTIVE (EU) 2016/943 on the protection of undisclosed know-how and business information (trade secrets) against their unlawful acquisition, use and disclosure.

¹⁷ See Article 4 (2) of the REGULATION (EC) No 1049/2001 regarding public access to European Parliament, Council and Commission documents.

Section in Tender Specifications	Where to insert in e-Submission
Section 4.4.1 Parties: identification of the tenderer:	"Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'- 'Other documents'. "Parties" → "Identification of the Tenderer" → "[Party Name]Required field "Declaration on honour"
Section 4.4.2 Parties: identification of the tenderer relating to the exclusion criteria.	"Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'- Exclusion criteria declaration on honour
Section 4.4.3 Parties: identification of the tenderer: Evidence relating to the selection criteria	"Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'- Technical and professional capacity" "Parties" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'- Economic and financial capacity" (no evidence to be provided at the stage of submission)
Section 4.4.4 Technical Tender – Addressing technical specifications and award criteria	"Tender data" → "Add your tender data – Technical tender [name of Call for Tender/ Lot name]"
Section 4.4.5: Financial Tender	" Tender data" → "Add your tender data – Financial tender [name of Call for Tender/ Lot name]"
Section 4.4.6: Submission Report	" Submission report" → "Add your signed submission report

- The tender must include all the requested information and be perfectly legible so that there can be no doubt as to words and figures.
- The technical tender with page numbering must cover all aspects and tasks required in the technical specifications and provide all the information needed to apply the award criteria.
- The tender must include a **cover letter** signed by an authorised representative, presenting the name of the tenderer (including all entities in case of joint tender) and identified subcontractors if applicable, and the name of the single contact point (leader) in relation to this procedure.
- Tenders shall include the information and documents requested by the Commission in order to assess the tender. **In order to help tenderers presenting a complete tender, a checklist of the documents to be submitted is provided in annex 8.** This checklist does not need to be included in the tender, but it is encouraged to use it in order to ease the assessment of the tenders

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

4.4.1 Section One: Parties: identification of the tenderer

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

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

In the e-Submission application, tab "Ways to submit", the tenderers should indicate the organization type (sole tenderer, joint tender involving subcontractors), fill out the required information and additional fields (Identification info, Registration info, ...), according to the type of tender. The information has to be completed for all entities participating in the tender, including subcontractor(s).

➤ Forms

The following forms (see below the different cases) shall be duly filled in and signed by a representative of the economic operator authorised to sign contracts with third parties.

These forms must be uploaded under "**Parties**" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments' - 'Other documents'

• Case 1: Submission by one tenderer

- The completed "Administrative information form" (**Annex 1**) accompanied by a legible copy of the **notice of appointment of the persons authorised to represent the tenderer** in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation which applies to the legal entity concerned requires such publication. If they are necessary in order to show the authorisation to represent the tenderer, the instrument of incorporation or constitution of the legal entity and/or a copy of the statutes have to be submitted. If the person(s) signing the tender or the person designated to sign the contract is/are entitled to represent the economic operator by a power of attorney from the abovementioned authorised persons, the power of attorney must also be submitted;
- The "Questionnaire for joint tenders and/or subcontracting" (**Annex 2**) signed by a legal representative of the tenderer.

• Case 2: Submission of joint tender

- For each entity involved (all members of the group of economic operators including the lead partner): the completed "Administrative information form" (**Annex 1**) accompanied by a legible copy of the notice of appointment of the persons authorised to represent the group member/leader in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation which applies to the legal entity concerned requires such publication. If they are necessary in order to show the authorisation to represent the group member/leader, the instrument of incorporation or constitution of the legal entity and/or a copy of the statutes have to be submitted;
- The "Questionnaire for joint tenders and/or subcontracting" (**Annex 2**) signed by a legal representative of the lead partner.
- For each member of the group of economic operators, except the lead partner: the "Power of attorney" (**Annex 4**) signed by a legal representative of the member.

• Case 3: Submission with subcontractor(s) and/or other entities

- In addition to the documents requested under Case 1 or 2, a "Commitment letter by a subcontractor" (**Annex 3.1**) and/or a "Commitment letter by an entity on whose capacities are being relied" (**Annex 3.2**), signed by an authorised representative of the subcontractor/entity.

➤ Evidence

In the course of the procedure, the Research Executive Agency Validation Services (hereafter the EU Validation Services) may contact tenderers via the Participant Register and ask for evidence with respect to their legal existence. The requests will be made through the register's messaging system to the e-mail address of the participant's contact person indicated in the register. It is the responsibility of the participant to provide a valid e-mail address and to check it regularly.

Please note that a request for such supporting documents in no way implies that the tenderer has been successful.

Therefore, the documents listed below shall not be submitted with the tender in eSubmission but may be requested by EU Validation Services at a later stage:

- For the purpose of the LEAR (Legal Entity Appointed Representative) appointment:
 - LEAR appointment letter — completed, dated and signed (handwritten blue-ink original signature) by the legal representative and the LEAR

- Declaration of Consent to the Participant Portal Terms & Conditions — completed, dated and signed (handwritten blue-ink original signature) by the legal representative of the organisation
 - Copy of the official, valid proof of identity for the legal representative (identity document issued by the national authority containing the photo and signature of the holder, i.e. ID card, passport or driving licence)
 - Copy of the official, valid proof of identity for the LEAR (identity document issued by the national authority containing the photo and signature of the holder, i.e. ID card, passport or driving licence) and
 - Valid official document to demonstrate that the legal representative has the authority to engage the organisation in its entirety.
- For the purposes of the legal validation of the entities:
- Signed legal entity identification form¹⁸ :
 - - Natural Person
 - - Private Law Body
 - - Public Law Body
 - Official VAT document or — if the entity is not registered for VAT — the proof of VAT exemption, not older than 6 months.
 - Signed Financial Identification Form¹⁹,

¹⁸ Available here: http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

¹⁹ Available here: http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial-id_en.cfm

- and the following additional documents, where relevant:

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

Further information on the documents that may be requested by *the EU Validation Services* is available in the [EU Grants and Tenders Rules on Legal Entity Validation, LEAR appointment and Financial Capacity assessment](#)

4.4.2 Section Two: Exclusion criteria

Article 136 of the Financial Regulation²⁰ defines situations when the tenderers shall be excluded from participating in procurement procedures.

➤ Form

The tenderer(s) including each partner in case of joint tender and each subcontractor²¹ must provide the "Declaration on honour on exclusion criteria and selection criteria" (**Annex 5**) attesting that they are not in one of the exclusion situations detailed in the Declaration on honour.

The declaration(s) shall be signed by an authorised representative either with advanced electronic signature based on qualified certificates or by scanning and uploading a hand signed copy.

The declaration(s) must be uploaded under "**Parties**" → "Identification of the Tenderer" → "[Party Name]" → tab 'Attachments'- Exclusion criteria.

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

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

➤ Evidence

The evidence shall not be submitted with the tender in eSubmission but may be requested by the Contracting Authority at a later stage.

Only upon request of the Contracting Authority, and for contracts with a value higher than EUR 139.000, the successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour (Annex 5) before signature of the contract and within a deadline given by the Contracting Authority. This requirement applies to each single tenderer, to the leader and each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria and/or whose share of the tasks to be executed represent more than 15% of the value of the contract. The Contracting Authority reserves the right to require these documents for the other subcontractors.

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

(a) the candidate is an international organisation or;

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

4.4.3 Section Three: Selection criteria

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

The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal (see Annex 2).

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

²⁰ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L:2018:193:TOC>

²¹ The Contracting Authority shall require that a tenderer replaces a subcontractor or an entity on whose capacity the tenderer intends to rely in case the subcontractor or entity is in an exclusion situation.

The tenderer (and each member of the group of economic operators in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with [Commission Recommendation 2003/361/EC](#). This information is used for statistical purposes only (See Annex 1).

➤ Form

The tenderers (and each member of the group of economic operators in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the declaration on honour (see Annex 5), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them.

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

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

➤ Evidence

Tenderers will be required to provide the evidence mentioned below

- ***In e-Submission, together with the tender*** for the evidence relating to technical and professional capacity (see below 4.4.3b)
- ***At a later stage and only upon request by EU Validation Services*** for the evidence relating to economic and financial capacity (see below 4.4.3a).

This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria

a- Economic and financial capacity:

In the course of the procedure the Research Executive Agency Validation Services (hereafter the EU Validation Services) may contact tenderers via the Participant Register and ask for evidence with respect to the economic and financial capacity of the organisation. The requests will be made through the register's messaging system to the e-mail address of the participant's contact person indicated in the register. It is the responsibility of the participant to provide a valid e-mail address and to check it regularly

Please note that a request for supporting documents in no way implies that the tenderer has been successful.

Therefore the documents listed below shall not be submitted with the tender in eSubmission but may be requested by EU Validation Services at a later stage.

- The following financial supporting documents covering 2 consecutive years:

Status	Documents to be submitted
Legal entity	<ol style="list-style-type: none"> 1. Profit and loss account 2. Balance sheet 3. Explanatory notes and/or annexes that form part of the above financial statements (if available) 4. External audit report¹³, for the procurement domain - to be submitted on voluntary basis if the entity has already been audited for other purposes
Natural Person	<ol style="list-style-type: none"> 1. Income tax declaration 2. Certified declaration of current patrimony (may not be applicable to procurement), including: <ol style="list-style-type: none"> a. fixed patrimony (e.g. land, tenement, hereditament, medium/long-term time deposits (more than one year), stock options that cannot be exercised within one year) b. current patrimony (e.g. available cash, savings, short-term time deposits (maximum of one year), stock-options that can be exercised within one year) 3. List of certified debts, which must contain all debts (with dates and figures), broken down in short-term debts (of maximum one year) and medium/long-term debts (of more than one year)(may not be applicable to procurement).
Start-up companies without closed accounts	Business plan

Further information on the documents that may be requested by *the EU Validation Services* is available in the [EU Grants and Tenders Rules on Legal Entity Validation, LEAR appointment and Financial Capacity assessment](#).

In case of joint tender, each partner must provide these documents

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

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

b- Technical and professional capacity:

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

- CVs of all personnel to be involved directly in performing the contract (including those working for any subcontractors) indicating educational and professional qualifications and experiences in areas relevant to the subject of this tender.

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

Tenderers must indicate whether or not the proposed persons are currently members of the personnel of the tenderer on the date of submission of the tender. The tender will clearly indicate if the proposed expert is a member of the personnel or not of the tenderer (see section 4.2.2

Subcontracting). Any person who is engaged on another project, where the input from his/her position in that contract will not have ended before the expected start of his/her activities under this contract, and where this commitment restricts his/her intended role under this contract must not be proposed for this contract.

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

4.4.4 Section Four: Technical tender

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

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

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

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

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

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

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

The tender shall comply with applicable environmental, social and labour legislation established under Union legislation, national legislation, collective agreements or the applicable international social and environmental conventions listed in Annex X to Directive 2014/24/EU²².

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

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

4.4.5 Section Five: Financial tender

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

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

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

²² OJ L 94 of 28.03.2014, p. 65

It is the responsibility of each tenderer to ensure that the total amount of the tender inserted in the relevant field of the e-Submission application corresponds to the amount indicated in the uploaded financial offer. In case of discrepancies, only the amount indicated in the financial offer will be taken into account.

- The financial offer shall be
 - expressed in euros. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to bear the risks or the benefits deriving from any variation.
 - quoted free of all duties, taxes and other charges, i.e. also free of VAT. The tenderer may indicate the amount of VAT but it must be shown separately

The European Union Institutions are exempt from such charges in the EU under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union of 8 April 1965 annexed to the Treaty on the Functioning of the European Union. Exemption is granted to the Commission by the governments of the Member States, either through refunds upon presentation of documentary evidence or by direct exemption.

For those countries where national legislation provides an exemption by means of a reimbursement, the amount of VAT must be shown separately. In case of doubt about the applicable VAT system, it is the tenderer's responsibility to contact his or her national authorities to clarify the way in which the European Union is exempt from VAT.

4.4.6 Section Six: Submission report: Consolidation of tender documents

- Once all information and documents have been encoded and uploaded in the e-Submission application, and you consider that the tender is complete, the application requires to create the submission report. **This Submission report will be generated by the e-Submission application.**
- It contains the list of documents that you submit. The sole tenderer's or leader's authorised representative(s) must sign the report. The submission report shall be signed by an authorised representative either with advanced electronic signature based on qualified certificates or by scanning and uploading a hand-signed copy.

In case of hand-signed copy, you **must send by post all the original documents** that were signed by hand at the latest on the first working day following the electronic submission of your Tender.

In case of a joint tender, the leader must collect all the original declarations signed by hand by the members of the group and send them by post together with the Submission report, if the latter was also signed by hand. The original documents must be sent to the postal address indicated under Heading I.1 of the contract notice, stating the reference to the call for tenders and the Tender ID.

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

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

4.5 Evaluation and award

The evaluation of the tender will consist on the following elements:

- Check if the tenderer has access to procurement (see *Section 4.2*);
- Verification of administrative compliance, namely if the tender is signed by the duly authorized representative(-s) of the tenderer (see Section 4.3 and the Invitation to Tender letter)
- Verification of non-exclusion of tenderers on the basis of the exclusion criteria
- Selection of tenderers on the basis of selection criteria

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

The *Contracting authority* will evaluate the abovementioned elements in the order that it considers to be the most appropriate. If the evaluation of one or more elements demonstrates that there are grounds for rejection, the tender will be rejected and will not be subjected to further full evaluation. The unsuccessful tenderers will be informed of the ground for rejection without being given feedback on the non-assessed content of their tenders. Only tenderer(s) for whom the verification of all elements did not reveal grounds for rejection can be awarded the contract.

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

The evaluation will be based on the information and evidence contained in the tenders and, if applicable, on additional information and evidence provided at the request of the *Contracting authority* during the procedure. If any of the declarations or information provided proves to be false, the *Contracting authority* may impose administrative sanctions (exclusion or financial penalties) on the entity providing the false declarations/information.

The Contracting Authority may reject abnormally low tenders, in particular if established that the tenderer or a subcontractor does not comply with applicable obligations in the fields of environmental, social and labour law.

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

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

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

4.5.1 Exclusion and selection of tenderers

The assessment of tenderers will take place in 2 stages:

A- Exclusion of tenderers

Article 136 of the Financial Regulation²³ defines situations when the tenderers shall be excluded from participating in procurement procedures (see Annex 5).

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

The initial verification of non-exclusion of tenderers will be done on the basis of the submitted declarations and consultation of the [European Union's Early Detection and Exclusion System](#). The documents mentioned as supporting evidence in the Declaration on Honour need to be provided whenever requested and where this is necessary to ensure the proper conduct of the procedure within a deadline given by the Contracting authority as indicated in point 4.4.2

B- Selection criteria

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

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

²³ <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L:2018:193:TOC>

The Contracting Authority will evaluate selection criteria (legal, regulatory, financial and economic) on the basis of the declarations on honour. Nevertheless, it reserves the right to require evidence of the legal and regulatory, financial and economic capacity of the tenderers at any time during the procurement procedure (see 4.4.1 and 4.4.3a).

- **Legal and regulatory capacity**

Tenderers must be allowed to pursue the professional activity necessary to carry out the work subject to this call for tenders. The tenderer (including each member of the group in case of joint tender) must provide the requested information (See 4.4.1).

- **Economic and financial capacity criteria**

- The tenderer must have the necessary economic and financial capacity to perform this contract until its end. In order to prove their capacity, the tenderer must comply with the following selection criteria :
- The **economic and financial capacity** of the tenderer will be assessed on the basis of the last annual turnover which has to be at least two times the annual value of the contract to be awarded (equal to the annual value of the financial tender submitted).

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

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

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

- **Technical and professional capacity criteria**

- The **technical and professional capacity** of tenderer(s) will be assessed from the qualifications of the staff/experts proposed, and, if any, the specific requirements mentioned in the tender specifications. In the case of joint tender (group of economic operators) or subcontracting, the technical and professional capacity shall be assessed in relation to the combined capacity of all the parties involved in the tender.
- The tenderer must meet the following criteria.

For lot 1:

Criteria relating to the team delivering the service:

Criterion	Educational and professional Qualification
Minimum requirement	At least one member of the team should have a minimum of 2 years of experience related to international comparisons of capital goods prices, underpinned by university studies of at least 3 years in economics, statistics or engineering.
Documentary evidence	CVs of staff members

Criterion	Educational and professional Qualification
Minimum requirement	At least one member of the team should have a minimum of 2 years of experience in the fields of collection, validation, calculation and analysis of statistical data, underpinned by university studies of at least 3 years in economics, statistics or engineering.
Documentary evidence	CVs of staff members

Criterion	Educational and professional Qualification
Minimum requirement	At least one member of the team should have a minimum of 1 year of experience in Visual Basic and Excel programming.
Documentary evidence	CVs of staff members

For lot 2:

Criteria relating to the team delivering the service:

Criterion	Educational and professional Qualification
Minimum requirement	At least one member of the team should have a minimum of 2 years of experience related to international comparisons of construction prices, underpinned by university studies of at least 3 years in economics, statistics or engineering.
Documentary evidence	CVs of staff members

Criterion	Educational and professional Qualification
Minimum requirement	At least one member of the team should have a minimum of 2 years of experience in the fields of collection, validation, calculation and analysis of statistical data, underpinned by university studies of at least 3 years in economics, statistics or engineering.
Documentary evidence	CVs of staff members

Criterion	Educational and professional Qualification
Minimum requirement	At least one member of the team should have a minimum of 1 year of experience in Visual Basic and Excel programming.
Documentary evidence	CVs of staff members

For lot 3:

Criteria relating to the team delivering the service:

Criterion	Educational and professional Qualification
Minimum requirement	At least one member of the team should have a minimum of 2 years of experience related to international comparisons of health costs, underpinned by university studies of at least 3 years in economics, statistics or engineering.
Documentary evidence	CVs of staff members

Criterion	Educational and professional Qualification
Minimum requirement	At least one member of the team should have a minimum of 2 years of experience in the fields of collection, validation, calculation and analysis of statistical data, underpinned by university studies of at least 3 years in economics, statistics or engineering.
Documentary evidence	CVs of staff members

The assessment will be based on the tender and on tenderers' answers in the compulsory reply forms.

Tenderers who wish to be taken into consideration must submit all the necessary supporting documents (as indicated in section 4.4.3) including all required forms (the forms provided in the annexes to this document must be used).

Tenderers will be required to provide the evidence (tenderers can use a format of their choice) of technical and professional capacity mentioned above (see 4.4.3 b) together with the tender. This requirement applies to each member of the group in case of joint tender and to subcontractors who contribute to the fulfilment of the selection criteria.

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

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

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

4.5.2 Compliance with minimum requirements

By submitting a tender a tenderer commits to perform the contract in full compliance with the terms and conditions of the procurement documents for this call for tender. Particular attention is drawn to the minimum requirements specified in Section 2 point 2.6 of the present tender specifications and to the fact that tenders must comply with applicable data protection, environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU.

The minimum requirements shall be observed throughout the entire duration of the contract. Compliance with these requirements is mandatory and cannot be subject to any assumptions, limitations, conditions, or reservations on the part of a tenderer.

Tenders that are not compliant with the applicable minimum requirements shall be rejected

4.5.3 Award of the contract

A- Evaluation of the technical quality of the tender

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

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

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

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

The technical quality of the tender will be assessed on the basis of the following criteria **for all lots**:

1. Technical approach and methodology (40 points)

The technical approach and methodology will be assessed on:

- Practical implementation proposed for the project demonstrate efficiency and effectiveness of approach and method and the extent to which all particularities mentioned in the specific project/lot have been considered. Detailed description on how the PPP methodology as described in the Eurostat-OECD Methodological Manual on Purchasing Power Parities will be implemented.
- Practical implementation proposed for the project cover all tasks and expected results to be carried out and demonstrate a thorough analysis of all the issues involved.
- Description on how the work convincingly show how to achieve the project's goals and outputs considering, if possible, examples to demonstrate its successful completion.
- Clear and detailed presentation and description of expected and tangible results to be attained.

2. Work plan and timetable - overall planning (20 points)

The work plan and timetable will be assessed on:

- Work plan and timetable demonstrate with sufficient detail that the project is achievable according to the schedule.
- Specific references to mobilisation of experts/team, allocation of resources, appropriate evaluation points, submission of reports and documents, meetings and milestones.

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

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

- Description of the organization of the work demonstrating how the contractor will cover the implementation of the contract and also how the contractor will provide support for the management and administration of the contract.
- Description of the proposed team (number / profiles) with their roles and responsibilities and of the different economic operators (in case of joint tender, including subcontractor if applicable) distributed for each task and work package. Balance between profiles and breakdown of the tasks (which profile is going to do which task and how much time will be devoted to each task per profile).
- Description of the proposed organization and on how it is suited for achieving the desired objectives of the project.
- Description given by the tenderer of the part of the project that he/she is able to implement autonomously.
- Estimate of how much and what kind of Eurostat involvement would be needed to ensure successful delivery and how cooperation with the Commission will be managed in practice.
- Business continuity measures in case staff assigned to the project leave. A description of the back-up system to cover absences of key profiles.

4. Quality arrangements - Quality control measure (20 points)

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

- Detailed quality control system applied to the service(s) foreseen in the tender specification.
- Detailed quality control over the expected deliverables.

B- Method of selecting the economically most advantageous tender

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

$$R = \left(\frac{P_{\min}}{P} * 100 \right) * 0.50 + Q * 0.50$$

where:

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

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

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

You will be informed of the outcome of this procurement procedure by **e-mail only**. It is your responsibility to provide a valid e-mail address together with your contact details in your tender (Annex 1) and to check this e-mail address regularly.

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

Simultaneously and individually, the Contracting Authority will inform all unsuccessful tenderers, by electronic means, that their application or tender has not been accepted, specifying in each case the reasons why the tender or application has not been accepted.

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

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

The Contracting Authority must reply within fifteen calendar days from receipt of the request.

The Contracting Authority may not sign the contract with the successful tenderer until 10 calendar days ("standstill period"). That period shall run from the day after the simultaneous dispatch of the notifications to successful and unsuccessful tenderers. However, if due to technical reasons the dispatch is made on paper, the standstill period is 15 days.

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

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

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

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

D- No obligation to award the contract

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