



Specifications

Tender No. VT/2012/077

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Technical part

1. Title of the contract

Support for the implementation of the EESSI project, by enhancing the project management, governance and communication processes

Lot 1 – Enhancing the project management approach of the EESSI project and facilitating the work of the Commission in relation with the EESSI governance bodies

Lot 2 – Developing communication in the EESSI Project

2. Background

One of the fundamental rights under the EU Treaty is the right of free movement of workers, as incorporated in Art. 45 TFEU (ex Art. 39 EC). In order to ensure that this right can be effectuated, the worker's social security rights must be guaranteed when moving from one Member State to the other. However, under Community law, there is no unified European social security system. Each Member State is responsible for its own social security system. Therefore, Community rules have been put in place to provide for the coordination of these national social security systems.

Until 1 May 2010, these rules were laid down in Regulation 1408/71 and the implementing Regulation 574/72. On that date, these Regulations have been replaced by the new Regulation 883/2004 and its Implementing Regulation 987/2009, which aim at simplifying and modernising the system of coordination of the national social security schemes. The legal provisions in both the old and new Regulations establish common rules and principles which have to be observed when applying national law, in order to ensure that the application of the different national legislations does not adversely affect persons exercising their right to free movement within the European Union.

In order to ensure an effective application of the Regulations by the Member States, national social security institutions need to exchange with each other information on the person concerned, such as his insurance history records, certificates concerning health care or certificates which show that a worker is posted to work in another Member State.

Under the old regulations, this information was exchanged by means of standardized forms (commonly known as "E" forms) and mainly exchanged on a paper basis. Certain Member States exchanged certain information electronically. This is mainly the case in the field of pensions and sickness. In accordance of the provisions of the new Regulations, all Member States will be required, after the end of a transitional period, to exchange this information electronically by the use of a common secure network, as explained below.

Electronic Exchange of information between national administrations

Under the new Regulations, one of the main innovations is the establishment of a common secure electronic network for the data exchange between the national administrations, which is called the **E**lectronic **E**xchange of **S**ocial **S**ecurity **I**nformation (hereinafter: EESSI).

EESSI is primarily a **communication (messaging) system** between national social security institutions to exchange social security information concerning persons that exercise their right to free movement within the EU.

Once implemented, it is expected that the exchange of data through the EESSI system will allow for more efficient, rapid and correct information exchanges between social security institutions for the implementation of the coordination rules in comparison to today's paper based data exchange. For the citizens, the automated data exchanges will lead to an essential improvement of the services provided under the Regulations, as the electronification of the data exchange will accelerate and make more accurate and timely the actual payment of social security benefits.

For its functioning, the EESSI system requires:

- the technical infrastructure (software components at European central level as well as at the central and institutions level in the Member States).
- Business model composed of messages templates and communication patterns for capturing the type of information that is needed and exchanged for social security purposes; these are known as the SEDs (Structured Electronic Documents) and message flows.

Also, in accordance with the regulations, **an electronic directory** which lists the contact details and further relevant information about national social security institutions and bodies has been set up.¹

Status of the EESSI project

The EESSI Project has been identified as a Project of Common Interest of the European Union under the IDABC Programme of the European Commission².

a) Status of developing the technical infrastructure

Based on a feasibility study on the possibilities to establish such a European architecture for this complex coordination of social security, issued in 2007, DG EMPL published an open call for tender for the EESSI system in 2008. Following this tender, an external contractor proceeded with the development of the EESSI system in close cooperation with the European Commission. The system, in accordance with the tender specifications, was composed of a central application to be hosted in the Commission's Data Centre (including the EESSI Directory), and an application (Reference Implementation) to be deployed in the national administrations of the Member States³.

The software developed by the external contractor was delivered and subjected, starting beginning of 2011, to an intensive testing campaign, organised with the collaboration of 6 pilot (testing) Member States. Based on the tests carried out, it became apparent that the system developed, even if delivered in accordance with the tender specifications, did not reply to all the business needs that the Member States had.

¹ http://ec.europa.eu/employment_social/social-security-directory/welcome.seam?langId=en

² This programme aims at supporting the creation of a European information society by promoting the development of pan-European eGovernment services across a range of EU policies in line with, amongst others, the overarching objectives of the Lisbon Strategy.

³ However, the Member States can develop or alternatively adapt their already existing national application in order to connect to the central infrastructure.

In order to avoid the risk of user rejection of the product and at the request of the Member States, DG EMPL therefore agreed to engage in some additional developments to address the changed business needs in certain areas of the system and to facilitate the efforts that the Member States would have to undertake in order to adapt their national application in order to connect to the central system. This resulted in a parallel development track. In April 2012, for efficiency reasons, it was decided that DG EMPL would take over the development of the EESSI software.

However, in this overall context, it became apparent that there was a real need to analyse, assess and consolidate all the information and recommended actions coming from a high number of stakeholders and also to carry out risk assessment and re-planning. Therefore, based on a decision of the governance bodies, in March 2012 a reflection period was organised within the project, with the aim of assessing whether the business requirements, functional requirements, and non-functional requirements that have been agreed upon at the outset of the project are still valid, and based on this, to identify the future road for the project.

Following the reflection period, the EESSI governance bodies decided in June 2012 that a process of updating, validating and prioritising the requirements that would allow the definition of the production worthy baseline version of EESSI should be implemented. Based on this, the specifications for the system would be redrafted and submitted to the approval of the governance bodies. The process of validating the requirements and specifications will take place on the assumption that the system will be delivered and implemented in 4 layers (transport, messaging, business and presentation).

The governance bodies also indicated that, to the extent possible, the process of validating the updated requirements and specifications for 3 layers (transport, messaging and business) should be completed by the end of 2012. This process will include several cycles of review with the technical forums in the Member States (via the existing national coordination channels) and comes with a highly challenging time table. The calendar for validating the requirements and specifications for the presentation layer is still to be defined.

This process of updating the requirements and specifications (especially for the first 3 layers) would allow DG EMPL a more clear estimation of the workload that is still expected and therefore the elaboration of a solid project planning for development and testing of the software, and then on the EESSI roll out.

The Regulations provided for a transitional period that would allow the Member States to make the necessary preparations for exchanging their data through the EESSI system. Such preparations concerned: identifying their Access Points (the entry institutions, maximum 5 per Member States, for all incoming and outgoing correspondence) and developing their national part of technical access points⁴, adapt where necessary their national applications and their business processes in order to be able to connect to the EESSI system, as well as to train their staff in the use of this new system. After the end of the transitional period, the data exchange should only be carried out by electronic means.

⁴ Every technical Access Point is composed of the international part, delivered via the centrally software, and the national part, which has to be developed nationally or alternatively use the national part from the reference implementation application delivered by the Commission.

The initial duration of the transition period was 2 years, which ended on 30 April 2012. However, considering the status of the project, this transitional period was extended until 30 April 2014.

b) Status of developing the business model

The Ad hoc groups worked on the elaboration of around 300 SEDs, accompanied by the relevant flows. This first version of the SEDs and flows, accompanied by relevant guidelines,⁵ was already used to some extent in some sectors and Member States.

Based from the feedback received from the field, several revisions have been undertaken with regard to the SEDs and flows. Currently, the expert groups are in a process of finalizing a revision of the SEDs, flows and guidelines in order to include some changes that appeared as necessary as a result of the experience gained in using the SEDs but also in order to cross align the underlying business processes which are similar in various sectors. It is expected that this new version will be submitted for legal validation to the Administrative Commission and approved by the end of the year. The business model will also be tested in real life testing once the software will become operational. Additionally, it is envisaged that updates of the SEDs will have to be undertaken after more experience with their practical usage will be gained; a definite time for these updates is still to be defined.

Governance and stakeholders of the EESSI Project

In order to ensure the management and implementation of this project and also ensure proper consultation and involvement of the main stakeholders in the implementation process of EESSI, a governance structure was put in place. This governance was set up in accordance with the respective provisions of the social security coordination Regulations but also with the specific needs identified for the EESSI project. However, in light of current evolutions and situation of the EESSI project, a revision and possible enhancements of the current governance structure are currently being investigated and looked at.

The main actors of the existing governance structure and the main EESSI stakeholders are:

a) The Administrative Commission for the Coordination of Social Security Systems

In accordance with articles 71-72 of Regulation (EC) no 883/2004, this forum is composed of Member States' representatives, which normally meet 4 times per year in 2 days meetings, and deals with administrative questions and questions of interpretation arising from the coordination regulation and facilitates the uniform application of the European legislation, in particular by promoting exchange of experience and best administrative practices.

With regard to EESSI, the Administrative Commission mainly decides on:

- strategic issues regarding the overall implementation of the project (such as decisions affecting the planning, costs or in any other way the main lines defined coordinates for the implementation of EESSI), based on proposals and advice from the Technical Commission and EESSI project Steering Committee (bodies described below);

⁵ Available at <http://ec.europa.eu/social/main.jsp?langId=en&catId=868>.

- legal questions with regard to the electronic data exchange between the national institutions, including legal questions concerning the implementation and operation of the EESSI system.

b) The Technical Commission on Data Processing

The Technical Commission on Data Processing of the Administrative Commission on Social Security is a working Group attached to the Administrative Commission which is tasked, in accordance with article 73 of Regulation (EC) no 883/2004 with proposing to the Administrative Commission common architecture rules for the operation of data-processing services, delivering reports and reasoned opinions for allowing the Administrative Commission to take decisions.

The Technical Commission on Data Processing is composed of representatives of the Member States (27 EU Member States, plus Iceland, Liechtenstein, Norway and Switzerland), it meets 4 times per year (normally in 2 days meetings).

Because of its specialized knowledge about and practical experiences with data processing, it plays a vital role in the management of the EESSI project and other projects using data-processing services, such as the electronification of the EHIC. The Technical Commission is considered a key player in the successful development and implementation and operation of the EESSI project in the following years.

More specifically, with regard to the EESSI implementation, the Technical Commission is tasked with;

- the management of pure operational and technical matters related to this project;
- steering on technical solutions that are most appropriate to address the business and technical needs in the Member States for the implementation of EESSI;
- priority-setting of further technical enhancements of the EESSI system etc.

Thus, the Technical Commission is extremely important in framing discussions and steering on all EESSI related components. The discussions in the Technical Commission are and probably also will be in the future lively animated by topics such as: project planning for delivering and implementing various system components or for specific phases of the project; challenges encountered at national level concerning the projects of integrating or developing national applications that will integrate with the centrally delivered system; appropriateness of the centrally delivered system with regard to general social security coordination objectives; its ability to correctly reply to the final users business needs, robustness and adequacy of the technical solution; requests for changes in the technical system in order to respond to the real business needs; preparing the EESSI production and efforts needed at national level for this (both from a technical but also organisational/institutional point of view), EESSI roll out strategies and related problems. The Technical Commission is also an important forum for the Member States to exchange best practices and experiences and build a common understanding on divergent opinions resulting from different and various business needs and variety of national specificities.

c) EESSI Project Steering Committee

The EESSI Project Steering Committee is a project management committee that has been set up by the Administrative Commission. It is composed of 15 experts from the Member States and DG EMPL, and is meeting on a regular basis (around 6 meetings of 1 day each per year). This body is meant to deal with high level project management and operational items related to the project. It also monitors the progress registered at national level for the implementation of EESSI, identifies and signals to the Administrative and Technical Commission problems and potential risks and proposes corrective measures to these decision making forums.

d) SEDs Ad Hoc Groups

8 SEDs groups have been set up by the Administrative Commission and consist of business experts from the Member States. These groups are dealing with the following social security topics: applicable legislation, family benefits, accidents at work and occupational diseases, sickness, pensions, unemployment, recovery and horizontal issues. Their work is mainly undertaken via electronic means of communication but also through meetings organised depending on the needs. These groups work for the development of the business model that will be used in the data exchange in EESSI, namely the Structured Electronic Documents (SEDs) and flows of communication within EESSI. Their initial task, namely the elaboration of the SEDs and flows to be used for the EESSI production, together with the related Guidelines is now close to be finished; this will allow the SEDs to be tested in real life cases. However, further updates/changes of these documents will have to be undertaken once the experience from their use into real life practice will build up.

e) Security Expert Forum (SEF)

This forum is an expert body for security related issues and it is composed of security experts from the Member States and European Commission; it meets 1-2 times per year in 1 day meetings. The SEF is providing technical assistance and advises the Administrative and Technical Commission, EESSI Project Steering Committee and DG Employment in managing the security of EESSI, including by monitoring and reviewing periodically the EESSI Security Policy; proposing new standards, guidelines and implementation measures relevant in the context of the EESSI Security Policy; managing and drawing lessons learnt from "high priority" security incidents, should they occur.

f) Member States

The Member States (27 EU+4 EFTA) are the ultimate users of the EESSI system. Once the EESSI system is developed, they will have to run the EESSI system at national level by ensuring the technical infrastructure (IT equipment, connections, cabling etc.), integrate the European delivered components in their national IT-applications in order to be able to exchange data with institutions in other Member States through EESSI and ensure the operability of the system by the national clerks.

g) DG Employment

DG Employment is responsible for the development and maintenance of the central EESSI infrastructure and the coordination of the work leading to the implementation of EESSI in the Member States. To this end, an EESSI project team composed of technical experts and project management resources has been set up.

This team is also responsible for providing support (in the form of information and technical support) to the Member States for integrating the national EESSI components into their national applications.

DG Employment also ensures the Secretariat of the governance bodies mentioned above (Administrative Commission, Technical Commission, EESSI Project Steering Committee, Security Expert Forum, Ad hoc groups).

In this role, DG Employment is responsible for elaborating, together with the Presidencies, and coordinating the work programme of these bodies and also ensuring the necessary follow up of the meetings, discussions that are organised in these forums by i.e.: elaborating the agenda, liaising with the Presidencies for identifying priority discussion items, ensuring that the delegations are provided with the relevant information by preparing and making available the relevant documents, organise the framework for gathering feedback on different items and presenting the results of such consultations etc.

Two units in DG Employment are working jointly for the implementation of the EESSI project: unit B4, which is the business owner of the system, and unit G4, where the technical team is located and which is therefore responsible for the technical implementation of the project. These units are working closely together on a daily basis and also an internal Steering Committee is established to ensure the overall management of activities of the two units in the implementation of their respective responsibilities.

Communication in EESSI Project

The main complexity of the EESSI project lies with the vast number of stakeholder groups within many institutions (more than 10,000 institutions that will need to be connected through 57 technical Access Points to EESSI) and in 31 different countries. Each set of stakeholders comes from different backgrounds (e.g. legal or technical), has different requirements and also a different level of understanding of IT. These stakeholders are represented in different forums within the EESSI project governance e.g. the Administrative Commission, the Technical Commission and the EESSI Project Steering Committee.

Additionally, another source of complexity comes from the numerous interdependencies existing between the EESSI project managed by DG EMPL and the national EESSI projects within each Member States.

In a project such as EESSI, appropriate communication via adequate communication tools and channels and in accordance with a clearly defined communication strategy is vital for: ensuring that all stakeholders' groups have easily available information suited to their needs, facilitating the decision making process and reaching (informed) decisions and agreements on relevant issues in the project (from planning to content related topics), ensuring that the information needed by the Member States in order to implement their national projects is available on time, in a comprehensive and clear fashion, managing expectations of the various stakeholders and securing alignment of opinions on the scope of the project and therefore minimising user rejection risks etc. Also, in a long-term perspective, good interaction between the IT providers and the end-users is a key element for success.

Good communication strategy and tools is important as concerns the propagation of information from the central EESSI team towards the Member States but putting in place the pre-requisites for national communication that effectively ensures further dissemination of information at national level, from its original national entry point to all national EESSI stakeholders, is an equally essential condition of effective overall communication.

Currently, the communication in the EESSI project is taking place via two main channels:

- a) governance bodies related communication, and
- b) technical experts in the Member States related communication.

a) The Secretariat of the governance bodies (Administrative Commission, Technical Commission, EESSI project Steering Committee), ensured by the Commission, is responsible for the communication related to the central EESSI project towards these bodies. This communication refers is mainly aimed at supporting and facilitating the consultation and decision making processes within these bodies.

National related communication is also assumed and considered an important pre-requisite for the functioning of the governance bodies, especially having in mind that the Technical Commission is organized as an expert body of the Administrative Commission, and, therefore, the national representatives in these two bodies are expected to communicate and ensure a single, coherent, national position. Moreover, a limited number of national delegates are allowed to attend these meetings and they are, in their turn, responsible for ensuring dissemination of the information obtained from these meetings to other national institutions/groups of stakeholders which are not directly represented in these forums.

With regard to the communication tools, in addition to the information provided in the meetings of these bodies, the communication is ensured via notes (distributed either by email but mostly published on Circa, the special service provided for Commission-related interest groups). A special mail box (empl-casstm@ec.europa.eu) has been established for managing the communication with the Member States.

b) A Service Desk for the EESSI project has been put in place by the Commission. This Service Desk is mainly responsible for the technical communication related to the central EESSI project towards the national technical experts. It is also responsible for replying to individual requests of information and assistance requests coming from the technical experts in the Member States.

To facilitate this communication several initiatives have been put in place:

- Creation of a functional mail box (empl-eessi@ec.europa.eu)
- Elaboration of a Communication plan documenting the actors in the communication process and main flows

- Creation of national networks based on establishing single points of contacts as communication entry point (i.e. appointed national contact persons for DG Employment): EESSI SPOCS (1 SPOC per country) and AP SPOCs (1 SPOC per Access Point⁶). While DG Employment is responsible for communicating the information towards the national communication networks, the EESSI/AP SPOCs are responsible for further disseminating the information to relevant national stakeholders.
- Creation and population of a platform for disseminating the documentation and gathering feedback/requests from Member States. A variety of tools are available: JIRA, Wiki pages, an information repository, a confluence space for active collaboration between various groups of experts etc.

Despite the existence of these communication channels, the Member States have voiced concerns with regard to the effectiveness of the communication in EESSI. Therefore DG EMPL has already initiated some efforts for elaborating a more comprehensive communication strategy. However, this process is in a rather inception phase and, in such a critical period of the project, more structured actions and further work for developing this strategy and the actions aimed at addressing the Member States concerns will be needed. This work will refer to improving the way the communication channels are used and could envisage: a clear documentation of the roles of all actors in the communication process (covering both the governance and technical forums), clear documentation of the documentation tools needed in specific types of cases, defining clear communication flows, timelines etc. Also it is expected that development and improvements of the communication tools could be sought, as well as actions which would target more directly the content of documents and structure of the information made available to the various stakeholders will be essential for addressing the communication concerns raised.

3. Subject of the contract

The subject of contract is the provision of services (consultancy, advisory activities, elaboration of documents, etc.) in the areas identified under point 4.

4. Tasks to be carried out by the contractor

Lot 1 – Enhancing the project management approach of the EESSI project and facilitating the work of the Commission in relation with the EESSI governance bodies

Task 1: The contractor shall advise and support DG EMPL in the general implementation of the EESSI, in accordance with project management best practices

Subtask 1.1. Support and assistance activities

The contractor shall support DG Employment in the overall management and implementation of the various project components by elaborating analytical and synthetic documents and drafting specific project management documents.

⁶ An Access Point is an institution (max 5 per Member State) which will host the technical Access Point. The national Access Point is the national gateway for connecting to the EESSI central system. The national systems will have to connect to this Access Point in order to get access (i.e. send and receive messages) via the EESSI infrastructure.

The contractor is expected to propose the main elements, building blocks and methodology for elaborating the respective documents, to elaborate the first drafts of the documents, based on discussions and agreement with DG Employment on the main lines, general framework and relevant constraints; it will also finalise the documents, in view of their approval, by integrating the feedback it will receive from DG Employment or other stakeholders (through the DG Employment communication channels).

DG Employment will provide the contractor with the information required by the tasks in question. The actual implementation of the strategies/approaches concerned will lie with DG Employment, which will remain fully responsible for the project management of the different EESSI project components.

The following represents a (non-exhaustive) list of documents or topics where assistance, as described above, would be required:

- drafting and updating (if so needed) the EESSI deployment and roll out strategy,
- drafting and updating (if so needed) the approach with regard to the management of transitions from one phase of the project to the other, from pre-live to live for example (by defining for example the criteria for transition from project to maintenance);
- maintaining and updating the EESSI risk plan and propose risk management approach and actions, including the elaboration of a back-up/recovery plan for system failure in acceptance or production environment (elaboration of risk plan in the first contractual year; updating the plan – continuously);
- propose improvements in the escalation processes or the service change management procedure etc.;
- further enhancing the text of the current draft Service Level Agreement (a support and maintenance agreement for the post go live period) which DG Employment has started working on (in the first contractual year);
- other strategies if jointly agreed with the Commission and included in the annual work programme.

Subtask 1.2. *Advisory* activities

The contractor shall advise the business owner of the project on issues related to the implementation strategy and planning of EESSI and also on the viability of technical strategies (e.g. software development, release strategies in the context of the overall implementation planning and strategy), in particular with a view to assess their effectiveness in achieving the overarching EESSI goals.

In accordance with the defined work programme, the contractor will be expected to verify, assess, comment and finally advise on the decision to implement, propose to the EESSI governance bodies for approval or alternatively how to amend the following:

- roadmap and project planning for implementing the central EESSI project (i.e. the steps to be undertaken, organisation of activities, calendar of activities, use of resources etc.). Where needed and appropriate, this activity should also envisage the dependencies and impact of the central planning on national implementation (however planning of implementing EESSI at national level by the participating countries is outside the scope of this activity) - (establishing a master plan – mainly for the first contractual year and then updating it, continuously)

- software development and delivery strategy (i.e. proposed use of resources for ensuring on time and qualitative delivery of the software components⁷);
- software release strategy;
- strategy and plan for testing the software deliverables;
- other implementation issues that might become relevant due to evolutions of the EESSI project.

In the execution of this task and within its scope, the contractor is also expected to proactively support DG EMPL in spotting in advance potential problems, critical issues in the project implementation, general solution finding activities, identification of possible enhancements in the implementation of the project from the perspective of best practices in the IT industry project management.

Task 2: The contractor shall provide assistance in the preparation of the work of the EESSI governance bodies and their supporting expert forums

Subtask 2.1 Assistance activities for the work of the governance bodies

The contractor is expected to support, provide assistance and facilitate the consultation and decision making processes in the governance bodies by:

- drafting notes for the meetings of the Technical Commission and/or EESSI Steering Committee (maximum of 4-6 notes per year with an average length of 4-6 pages). The topic of the notes will be agreed with DG Employment at least 1,5 months in advance of the actual delivery date of the note;
- these notes will focus mainly on issues such as: the general management and implementation of the project (i.e. approaches, documents, plans envisaged under task 1), the articulation between business and IT aspects of data processing services for the application of the Regulations in the field of social security coordination, improvements in the use by the Member States of the developed tools (such as improvements in the use of the codes in the Directory Services in order to ensure coherent application of codes across countries) etc.
- ensuring the follow up of the elaborated notes by assessing the feedback received from the Member States and proposing possible actions/solutions to be implemented on the issues in question;
- participating in and contributing to (by introducing the notes it elaborated or holding presentations) relevant meetings of the governance bodies;
- producing reflection papers on technical developments that can be regarded as useful for on-going and possible future projects in the field of social security coordination (maximum 2 per year, maximum 8-10 pages);
- drafting the minutes of the meetings of the Technical Commission⁸, Steering Committee and Security Expert Forum.

Subtask 2.2 Coordination activities

The contractor is expected to reinforce the coordination of activities for some components of the EESSI project, as follows:

- support the coordination of the activities of the SEDs ad hoc groups in updating the SEDs, based on additional experience gained with their practical use, for

⁷ This does not refer to the actual development of the software, the technologies used in the development etc.

⁸ For the Technical Commission and the Security Expert Forum recordings in English of the discussions are available; therefore presence in these meetings for the purpose of minutes drafting is not mandatory.

- example in testing sessions, dry runs and later on in real life (especially relevant for the end of the first year and second contractual year)
- the coordination of the process of consulting the stakeholders and collecting their feedback on requirements and specifications of the system layers (especially envisaged for the presentation layer) (especially relevant for the first year);
 - support the coordination of the work of the Security Expert Forum in providing feedback on items which are relevant, from a security point of view, for the system (such as appropriateness of the technical solutions proposed from a EESSI security policy point of view, identification of security gaps in the EESSI system etc.) (continuously);
 - monitor technical developments and initiatives at European level that are of potential relevance for the practical implementation of the Community system of coordination of social security schemes, such as the developments in the field of E-government and EHealth. This also includes liaising with external organizations that can be regarded as useful for the successful deployment of projects in the field of social security coordination (continuously).

For carrying out these activities, the contractor is expected to, for example, liaise with the groups concerned and their respective chairs/rapporteurs, propose and define, after consulting DG EMPL, the scope of work, the calendar of the tasks, preparing agendas, gathering and presenting in a structured fashion the feedback received, proposing courses of actions, drawing conclusions when so required, etc. These tasks will be implemented in conjunction with the groups' rapporteurs/chairs. DG EMPL will provide the necessary information to the contractor, will provide, when so needed, the required substance related knowledge and expertise for the topics which are debated in the concerned groups, will ensure the logistics for these meetings (meeting room etc).

General indications relevant for both Task 1 and 2 of Lot 1

DG Employment estimates that the contractor will be asked to participate in between 30 and 50 days of meetings for **Lot 1**, in meetings such as: the meetings of the governance bodies (Technical Commission on Data Processing; EESSI Project Steering Committee and Security Expert Forums); the preparatory meetings of these bodies (each preparatory meeting takes place for half a day, on the day preceding the plenary meeting); work and coordination meetings with DG Employment representatives. The contractor is not expected to attend all meetings of the governance bodies, but only those where his presence is needed depending on the topics discussed and input needed.

All these meetings take place in Brussels, but it is within the prerogative of the Member State holding the Presidency of the European Union to hold an ad hoc meeting of the Technical Commission in their capital.

In the implementation of this lot, and in accordance with the nature of the activities concerned, the contractor is expected to have regular intensive contacts with DG EMPL by any means of communication (i.e. meetings, phone, email).

A kick off meeting with DG Employment will take place at the beginning of the contract to discuss and agree upon the main areas of focus of the contractor's activities and exact documents which the contractor will be asked to deliver in the course of the year.

Based on the consultations, the contractor will have to elaborate a annual work programme, including detailed activities agreed with Commission and their timing, that will be submitted to the Commission for approval. A revision of this work programme, to take into account progress reached and potential evolutions in the needs of the Commission, based on status of the EESSI project will be proposed by the contractor in the Interim Report (see chapter 7 for further details).

The tenderers are invited to note that while the main activities under this task will remain the same, should the contract be extended beyond its initial duration (see chapter 5 for further details), the balance the resources that will have to be allocated between the tasks or subtasks might also need to evolve from year to year.

The annual work programme is therefore to be seen as an implementation mechanism that would allow the contractor to correctly assess and deploy its resources in order to reach the agreed results.

The tenderer is asked to include in its bid the following items relevant for Lot 1:

- **the methodology proposed for the implementation of each of the tasks and their subtasks;**
- **its view on the consultations and process required for the definition of the work programme;**
- **an early view of the envisaged work programme that includes a provisional indication of allocation of resources for the different subtasks, definition of activities and responsibilities for the allocated resources and, where possible, timeline for delivery of services;**
- **explanation on how it envisages the cooperation with the relevant Commission services, what are the proposed working methods to this extent and develop its understanding of the division of responsibilities between the Commission and contractor;**
- **a presentation of the degree of availability of the human resources for the different tasks;**
- **a presentation of its flexibility in adapting its proposed methodology, initiatives and approach to respond to the evolving needs of the EESSI project.**

Lot 2 – Developing communication in the EESSI Project

Task: The contractor shall provide support to DG EMPL in developing the communication in the EESSI project.

Subtask 1 Gap analysis

The contractor shall elaborate a gap analysis of communication needs with a view to ensure that well-structured, easily available and comprehensive information is available to all EESSI stakeholders.

The gap analysis should cover both the content (i.e. documentation, manuals etc.) and project progress (i.e. formal reporting on planning or project progress etc.) related communication, as well as communication towards the governance bodies and technical experts' forum.

It will furthermore envisage the flows of information from DG EMPL to the Member States and vice-versa.

To this end, the contractor shall:

- consult / gather feedback on communication issues from various EESSI stakeholders (representatives of DG Employment, representatives of Member States from various interest groups such as technicians, members of decision making bodies, users, etc.;
- take into account and look into the existing communication networks set up in EESSI (set up, participants, role, how are they used etc.);
- analyse the current communication strategy and tools and existing flows of information that DG EMPL is using (i.e. Wiki Pages, use of Jira, structure and use of Information Repository, structure and use of tools for formally communicating with the governance bodies.

Subtask 2 Enhancement of the communication strategy

Based on the gap analysis, the contractor shall propose enhancements and adaptations of the EESSI communication strategy in order to ensure that the most adequate tools, procedures and communication methods are used for the needs identified.

The contractor shall develop the communication strategy in particular by ensuring that:

- all roles, procedures and tools in the communication process are properly documented;
- the type of communication used in the EESSI project, tools and information distribution channels, the target group of different type of communication, frequency of communications etc. are clearly defined and explained;
- communication flows are, to the extent possible and depending on their content, standardised in terms of presentation, distribution channels used and processes employed;
- activities and initiatives required for improving the content, structure of the information are identified in order to ensure that the information is easily available, well-structured and complete as compared to the stakeholders' needs;
- activities and initiatives for improving the awareness of the stakeholders of the relevant sources of information and how should these be exploited are identified.

While doing so, the contractor shall observe the different needs and expectations of the target groups to which various types of communication is addressed (i.e. business, technical, policy, decision making persons, general public).

Subtask 3 Implementation of the communication strategy

The contractor shall assist DG EMPL with the implementation of the activities from the revised and enhanced communication strategy, based on an action plan agreed with the Commission. The action plan should detail concrete action items for the implementation of the following:

- elaborate standardized procedures for communication on types of topics (in accordance with what was identified in the communication strategy); these procedures would provide internal checklists for the ones issuing the

- communication but would also serve the purpose of managing expectations of the ones receiving or expecting the respective communications;
- support the elaboration of the content inserted in specific tools of communication (e.g. factsheets, newsletters, as mentioned in the communication strategy etc.);
 - work on (better) structuring the information already available in the existing communication tools (e.g. Information Repository, existing documentation for users etc.);
 - work on developing the EESSI public website (i.e. outline main content items, discuss presentation, level of information detail etc);
 - make proposals on engaging the Member States in sharing best practices and information on national preparations in order to foster the gradual development of structured information on possible national EESSI preparation and implementation strategies and experiences;
 - support the organisation of the communication events included in the communication strategy (if any).

General indications relevant for Lot 2

The contractor is expected to work closely with DG EMPL communication manager.

Within the scope of this task, the Contractor should consider the need to attend and contribute to various meetings either with the internal EESSI team (located in Brussels) or external stakeholders. DG Employment estimates that the contractor will be asked to participate in between 10 and 20 days of meetings.

A kick off meeting with DG Employment will take place at the beginning of the contract.

The tenderer shall include in its bid the following items relevant for Lot 2:

- **the methodology proposed for the implementation of this task and its subtasks;**
- **an outline of its view on the possible contents and relevant items for a communication strategy for this type of project;**
- **proposals of activities or initiatives that could be included in the communication strategy and implemented under the current contract;**
- **a proposed work programme that includes the allocation of resources for the different subtasks, definition of activities and responsibilities for the allocated resources and an indicative time plan;**
- **explanation on how it envisages the cooperation with the relevant Commission services, what are the proposed working methods to this extent, and its understanding of the division of responsibilities between the Commission and contractor;**
- **a presentation of the degree of availability of the human resources for the different tasks;**
- **a presentation of its flexibility in adapting its proposed methodology, initiatives and approach to respond to the evolving needs of the EESSI project.**

5. Time schedule and reporting

See Article I.2. of the contract.

The contract duration for each lot will be of 12 (twelve) calendar months from the date of contract signature.

The initial contract may be renewed 3 times for a period of 12 calendar months each only with the express written agreement of the parties before payment of the balance. Renewal does not imply any modification or deferment of existing obligations.

Reporting and specific deadlines for the performance of tasks:

The contractor shall:

- ensure continuous coordination and reporting to the European Commission. **The tenderer is expected to propose in its bid how this coordination and reporting could be organised.**
- Produce, no later than 6 months after the signature of the contract, **an Interim Report** assessing overall progress towards the achievement of the work programme together with a time-planning for the remaining actions to be carried out by the end of the contractual period.
- The **Final Report** will be delivered at the latest 12 months after the start of the contractual period. The report should provide a concise overview of the work carried out during the course of the entire contract period, as well as any comments, suggestions or recommendations judged useful or necessary by the contractor. It shall provide details of all tasks carried out, deliverables produced and results achieved.

All reporting must be done in English and delivered both on paper and electronically.

An overview of the timing of deliverables is presented below. This does not include the timing of services which do not follow a strict time schedule, such as advisory activities (which are of a more continuous and ad hoc nature).

LOT1	
Work programme and activity reports (for tasks 1 and 2)	
T0+2 weeks	Kick off meeting with the Commission
T0+6 weeks	Annual work programme (to include detailed activities agreed with Commission and their timing)
T0+6 months	Interim Report assessing overall progress towards the achievement of the work programme together with a time-planning for the remaining actions to be carried out by the end of the contractual period.
T0+11 months	Draft final report
T0+12 months	Final report
Deliverables	
Task 1	
TR+1 month	Submission of first draft of the document (assistance activities under task 1)
TR+2 months	Finalised document integrating feedback from the Commission

Task 2	
TR+6 weeks	The draft note (for notes which do not imply an analysis of feedback received from the Member States)
TM+2 weeks	Draft meeting minutes for the meetings of the Technical Commission, Steering Committee and Security Expert Forum
T0 + 6 months	Reflection paper on technical developments and initiatives that that can be regarded as useful for ongoing and possible future projects in the field of social security coordination
T0 + 12 months	Reflection paper on technical developments and initiatives that that can be regarded as useful for ongoing and possible future projects in the field of social security coordination

T0 = date of signature date of the contract between the Commission and the contractor:

TR = date of agreeing with the Commission the content of a note to be presented to the governance bodies (subtask 2.1)

TM=date of the meeting

LOT2	
Work programme and activity reports	
T0+2 weeks	Kick off meeting with the Commission
T0+6 weeks	Annual work programme (to include detailed activities agreed with Commission and their timing)
T0+6 months	Interim Report assessing overall progress towards the achievement of the work programme together with a time-planning for the remaining actions to be carried out by the end of the contractual period.
T0+11 months	Draft final report
T0+12 months	Final report
Deliverables	
T0+2 months	Gap analysis
T0+4 months	Draft enhanced communication strategy
T0+5 months	Final Communication strategy
T0+6 months	Agreement with the Commission on the action plan for the implementation of the communication strategy, which will detail the activities from the Communication strategy which will be implemented with the support of the contractor
T0+ 12 months	Implementation of agreed communication related activities

T0 = date of signature

6. Payments and standard contract

In drawing up the bid, the tenderer should take into account the provisions of the standard draft contract comprising the "General terms and conditions applicable to service contracts".

7. Prices

Under the terms of Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union, the latter are exempt from all charges, taxes and duties, including value added tax; such charges may not therefore be included in the calculation of the price quoted. The amount of VAT is to be indicated separately.

The price must be stated in EUR(€), net of VAT (using, where appropriate, the conversion rates published in the C series of the Official Journal of the European Union on the day when the invitation to tender was issued), and broken down according to the following model:

Breakdown of prices

Description	Unit price in EUR	Max. no of units	Unit type	Sub-total per item in EUR	Total amounts in EUR
Experts' fees (to be specified for each specific task)					
Details	0.00	0	w. d.	0.00	0.00
Other costs (to be specified)					
Details	0.00	0	Unit	0.00	0.00
Total amount (art. I.3.1.) of the contract					0.00

The total price for all tasks under **Lot 1** may not exceed **220,000.00 Euro**.
The total price for all the tasks under **Lot 2** may not exceed **60,000.00 Euro**.

Professional fees and other costs

- ☐ Fees, expressed as the number of person-days multiplied by the unit price per working day for each expert proposed. The unit price should cover the experts' fees and administrative expenditure. The contractor's costs for participation in meetings must be included in fees.
- ☐ Other costs are not authorised

The total price may not exceed 280,000.00 Euro for both lots or 220,000.00 Euro for Lot 1 and 60,000.00 Euro for Lot 2.

Administrative part

8. Participation

Please note that:

The competition is open to any physical person or legal entity coming within the scope of the Treaties and any other physical person or legal entity from a third country which has concluded with the Union a specific agreement in the area of public contracts, under the conditions provided for in that agreement.

Where the Multilateral Agreement on Public Contracts concluded within the framework of the WTO applies, the contracts are also open to nationals of States that have ratified this Agreement, under the conditions provided for therein. It should be noted that research and development services, which come under category 8 of Annex II A of Directive 2004/18/CE, are not covered by this Agreement.

9. Groupings of economic operators or consortia

Tenders can be submitted by groupings of service providers/suppliers who will not be required to adopt a particular legal form prior to the contract being awarded, but the consortium selected may be required to assume a given legal form when it has been awarded the contract if this change is necessary for proper performance of the contract⁹. However, a grouping of economic operators must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination. The documents required and listed in the following points 10 and 11 must be supplied by every member of the grouping.

Each member of the grouping assumes a joint and several liability towards the Commission.

10. Exclusion criteria and supporting documents

1) Bidders must provide a declaration on their honour, duly signed and dated, that they are not in one of the situation referred to in Articles 93 and 94 a) of the Financial Regulation. Those articles are as follows:

"Article 93:

1. Applicants or tenderers shall be excluded if:

a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;

⁹ These entities can take the form of an entity with or without legal personality but offering sufficient protection of the Commission's contractual interests (depending on the Member State concerned, this may be, for example, a consortium or a temporary association).

The contract has to be signed by all members of the group, or by one of the members, which has been duly authorised by the other members of the grouping (a power of attorney or sufficient authorisation is to be attached to the contract), when the tenderers have not formed a legal entity.

- b) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of res judicata;*
- c) they have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;*
- d) they have not fulfilled their obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;*
- e) they have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Union's financial interests;*
- f) they are currently subject to an administrative penalty referred to in Article 96(1) .*

(...)

Article 94 :

Contracts may not be awarded to candidates or tenderers who, during the procurement procedure:

- a) are subject to a conflict of interest;*
- b) are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or fail to supply this information;(...)"*

2) The tenderer to whom the contract is to be awarded shall provide, within a time limit defined by the contracting authority and preceding the signature of the contract, the evidence referred to in Article 134 of the implementing Rules, confirming the declaration referred to in point 1 above.

Article 134 of the Implementing Rules – Evidence

§3. The contracting authority shall accept as satisfactory evidence that the candidate or tenderer to whom the contract is to be awarded is not in one of the situations described in point (a), (b) or (e) of Article 93(1) of the Financial Regulation, a recent extract from the judicial record or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied. The contracting authority shall accept, as satisfactory evidence that the candidate or tenderer is not in the situation described in point (d) of Article 93(1) of the Financial Regulation, a recent certificate issued by the competent authority of the State concerned.

Where the document or certificate is not issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

§4. Depending on the national legislation of the country in which the candidate or tenderer is established, the documents referred to in paragraph 3 shall relate to legal persons and/or natural persons including, where considered necessary by the contracting authority, company directors or any person with powers of representation, decision-making or control in relation to the candidate or tenderer.

See Annex I (which may be used as a checklist) for the supporting documents accepted by the European Commission to be provided by applicants, tenderers or tenderers to who the contract will be awarded.

3) The contracting authority may waive the obligation of a candidate or tenderer to submit the documentary evidence referred to in Article 134 of the Implementing Rules, if such evidence has already been submitted to it for the purposes of another procurement procedure launched by DG EMPL and provided that the issuing date of the documents does not exceed one year and that they are still valid.

In such a case, the candidate or 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.

11. Selection criteria

a) Economic and financial capacity:

- ☐ Sufficient economic and financial capacity to guarantee continuous and satisfactory performance throughout the envisaged lifetime of the contract.
- ☐ Sufficient turnover in relation to the volume of tasks under this contract.

All tenderers must provide proof of their economic and financial capacity by submitting the following documents:

- a) a full copy of the concerned legal entities' annual accounts (balance sheet, profit and loss account, notes on the accounts and auditors' remarks when applicable) of the last two years, as approved by the general assembly of the company and, where applicable, audited and/or published. These documents must be signed by the authorised representative of the tenderer;
- b) alternatively to a), by filling Annex 6 (Financial and Economic Capacity Overview Form), consisting of an extract of the concerned legal entities' annual accounts (balance sheet, profit and loss account, notes on the accounts and auditors' remarks when applicable) of the last two years, as approved by the general assembly of the company and, where applicable, audited and/or published. These documents must be signed by the authorised representative of the tenderer.
- c) a statement of overall turnover and turnover concerning the tasks, supplies or services covered by this contract for the last three financial years.

If, for some exceptional reason which the contracting authority considers justified, the tenderer or candidate is unable to provide the references requested by the contracting authority, he may prove his economic and financial capacity by any other means which the contracting authority considers appropriate.

b) Technical capacity:

The tenderer shall prove that it has:

For Lot 1

- Previous experience in managing similar projects;
- Previous experience in working with the public sector (national or European level);
- Sufficient ability and means available to carry out their tasks, notably in terms of human and technical resources (IT related) available;
- Excellent English drafting skills demonstrated by previous experience in drafting reports, analytical notes/documents, compiling, structuring and analysing feedbacks received from various stakeholders.

For Lot 2

- Previous experience in managing similar projects;
- Sound experience in elaborating and implementing communication plans and strategies;
- Previous experience in working with the public sector (national or European level);
- Sufficient ability and means available to carry out their tasks, notably in terms of human and technical resources (IT related) available;
- Excellent English drafting skills demonstrated by previous experience in drafting reports, analytical notes/documents, compiling, structuring and analysing feedbacks received from various stakeholders.

The tenderer is asked to provide the following means of proof (**for both Lot 1 and Lot 2**):

- The list of the principal services provided in the past three years, with the sums, dates and recipients, public or private;
- The CVs and qualifications of the employees who will be involved in the implementation of the actions. The CVs should include a list of main works in relation to the subject specified in this tender. If the work was undertaken for the European Commission, the candidate must also include the Commission reference number of the contract and the DG/Directorate/Unit for which the contract was performed;
- A statement of the average annual manpower and the number of managerial staff of the service provider or contractor in the last three years;
- An indication of the proportion of the contract which the service provider intends to subcontract as well as a list of potentially envisaged subcontractors (if applicable);
- In the case of tenders from consortia, written confirmation from each member of the consortium that they are ready and willing participate in the work should the contracted be awarded to their consortia, and briefly describing their role.

The team of experts proposed for the implementation of **task 1 of Lot 1** shall include at least 1 expert who fulfils the following conditions

- Level II or higher expertise (see chapter 13 of this document);
- Minimum 4 years professional experience in IT systems project management;

- Ability to understand and translate technical, resources and policy constraints into project management strategies demonstrated by tasks carried out in previous projects;
- Sound experience in projects involving governance structures established at European level and cross-institutional and cross-border stakeholders;
- Excellent planning skills particularly on IT project implementation and delivery;
- Excellent command of oral and written English, especially good drafting and report writing skills in English demonstrated by previous report writing tasks, or by the elaboration of other relevant written documents (such as articles etc);

The team of experts proposed for the implementation of **task 2 of Lot 1** shall include at least 1 expert who fulfils the following conditions:

- Level III or higher expertise (see chapter 13 of this document);
- Minimum 3 years professional experience in the international projects that involved cross-institutional and –border stakeholders and/or governance structures established at European level;
- Good knowledge and understanding of the social security coordination sector;
- Knowledge of legal and administrative issues related to the use of information technologies demonstrated by involvement in previous projects with an IT component;
- **Excellent interpersonal and oral communication skills** to a variety of stakeholders and for regular liaison with Member States and the Commission Services and to address meetings of the governance bodies demonstrated by previous work in similar bodies, acting as conference/workshops speaker or mediator etc.;
- Excellent command of oral and written English, especially good drafting and report writing skills in English demonstrated by previous reporting tasks, or by elaboration of written documents (such as articles etc.);
- Excellent planning and work organisation skills demonstrated by previous experience in coordinating the work of teams, or elaboration of plans for the delivery of a specific service of product, or organisation (logistically and content wise) the implementation of seminars/ workshops/conferences.

The team of experts proposed for the implementation of **the task of Lot 2** shall include at least 1 expert who fulfils the following conditions:

- Minimum 3 years professional experience in communication related activities;
- Sound experience in elaborating gap analysis with regard to implementing the communication component in a project aiming at the delivery of a specific product or services;
- Sound experience in defining and drafting communication strategies and plans;
- Sound experience in international projects that involved cross-institutional and cross–border stakeholders;
- Excellent command of oral and written English, especially good drafting and report writing skills in English demonstrated by previous report writing tasks, or by the elaboration of other relevant written documents (such as articles etc.);
- Excellent communication skills to a variety of stakeholders demonstrated for example by work carried out in forums representing the stakeholders or moderating workshops.

The experts should prove compliance with the requirements by any combination of the following means

- CV
- List and examples of projects carried out or to which he/she contributed
- Other practical work in the required field
- Diplomas or certificates

12. Award criteria

The contract will be awarded to the bid offering the best price/quality ratio, taking account of the following criteria (for lot 1 and 2):

12.1 Qualitative criteria

<i>INDIVIDUAL TECHNICAL EVALUATION CRITERION</i>	<i>POINTS</i>
<p><i>(1) Approach</i></p> <ul style="list-style-type: none"> ▪ Understating of the nature, context and the constraints in which the assignment will be implemented ▪ Understanding of the tasks to be implemented and results to be achieved ▪ Overall feasibility and relevance of proposals and initiatives for successfully fulfilling the described tasks and their correspondence to the needs of the Commission 	35
<p><i>(2) Methodology proposed</i></p> <ul style="list-style-type: none"> ▪ Coherence with the objectives and nature of the tasks ▪ Quality, efficiency and feasibility of the proposed methodology ▪ Availability and flexibility demonstrated in the tender ▪ Quality, efficiency and feasibility of the proposed coordination and related working methods of the team of experts with the Commission services ▪ Quality of the continuous reporting mechanism towards the Commission 	35
<p><i>(3) Work organisation and quality plan</i></p> <ul style="list-style-type: none"> ▪ Clear presentation of the work organisation ▪ Efficiency and adequacy of the distribution of tasks to the proposed resources ▪ Efficiency and adequacy of the management structures and coordination of the team of experts in relation to the individual tasks ▪ Adequacy of the proposed team in relation with the tasks ▪ Effectiveness of quality assurance processes 	30
Maximum points that can be allocated	100

The selected tender is assessed according to the above qualitative award criteria and the weighting applicable to each criterion. Please note that the contract will not be awarded to any bid that receives:

- **less than 70 % in the overall points in the total of the award criteria**
- **less than 50% in the points awarded for a single criterion of the award criteria**

Tenders should elaborate on all points addressed by these specifications in order to score as many points as possible. The mere repetition of mandatory requirements set out in these specifications, without going into details or without giving any added value, will only result in a very low score. In addition, if certain essential points of these specifications are not expressly covered by the tender, the Commission may decide to give a zero mark for the relevant qualitative award criteria.

These criteria weighted as indicated above will determine the quality of the bids and will be compared with the price in order to determine the proposal that provides the **best value for money**.

12.2. Price

Tenders presenting **a total price superior to the maximum amount of 220,000.00 Euro for Lot 1 or 60,000.00 Euro respectively for Lot 2 will be excluded** from the rest of the assessment procedure.

12.3. Final score

The contract will be awarded to the tender which is the most cost-effective (offers the best value for money) on the basis of the ratio between the total points scored for the qualitative award criteria and the price, in accordance with the following formula:

$$\text{Final score} = (\text{Quality score} \times 0,60) + [(\text{lowest price offer/price offered}) \times 100] \times 0,40$$

Note: The lowest price offer in this context refers only to bids passing the thresholds set out in chapter 12.1.

13. Content and presentation of bids

Content of bids

Tenders must include:

- ☐ all information and documents necessary to enable the Commission to appraise the bid on the basis of the selection and award criteria (see points 11 and 12 above);
- ☐ a bank ID form duly completed and signed by the bank;
- ☐ a "legal entity" form duly completed;
- ☐ the price;
- ☐ the name and function of the contractor's legal representative (i.e. the person authorised to act on behalf of the contractor in any legal dealings with third parties);
- ☐ proof of eligibility: tenderers must indicate the State in which they have their registered office or are established, providing the necessary supporting documents in accordance with their national law;
- ☐ the detailed CVs of the proposed experts;
- ☐ List of experts assigned, classified by level of expertise according following criteria:

Level of qualification I
<i>Highly qualified expert having assumed important responsibilities in his/her profession, recruited for his/her management/supervisory, thought and creativity skills as regards professional practise. He/she must have at least 15 years professional experience of which at least 7 must be connected with the professional sector concerned and the type of tasks to be performed.</i>
Level of qualification II
<i>Highly qualified expert having assumed responsibilities in his/her profession, recruited for his/her management/supervisory, thought and creativity skills as regards professional practise. He/she must have at least 10 years professional experience of which at least 4 must be connected with the professional sector concerned and the type of tasks to be performed.</i>
Level of qualification III
<i>Certified expert having received a high-level training in his/her profession, recruited for his/her thought and creativity skills as regards professional practise. He/she must have at least 5 years professional experience of which at least 2 must be connected with the professional sector concerned and the type of tasks to be performed.</i>
Level of qualification IV
<i>Junior expert, newcomer to the profession but holding a university degree or equivalent training related to the professional sector concerned and the type of tasks to be performed.</i>

Presentation of bids

Bids must be submitted in triplicate (i.e. one original and two copies).

They must include all the information required by the Commission (see points 7, 9, 10 and 11 above).

They must be clear and concise.

They must be signed by the legal representative.

They must be submitted in accordance with the specific requirements of the invitation to tender, within the deadlines laid down.