



European Centre for the
Development of Vocational Training
Procurement Service

Thessaloniki, 31/10/2006

OPEN INVITATION TO TENDER

AO/Cedefop/LT/VC/027/06

‘Virtual Communities of Practice Platform and Related Services’

Dear Sir/Madam,

We thank you for the interest you have shown in this tender.

The purpose of this tender and additional information necessary to present a tender can be found in the attached Tendering Specifications.

You should note however the following important points concerning the submission of a tender and its implications.

1. Tenders should be submitted in one of the official languages of the European Union.
2. Tenders may be submitted:
 - a) either by post or by courier service to be dispatched not later than 05/12/2006 in which case the evidence shall be constituted by the date of despatch, the postmark or the date of the deposit slip, to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
For the attention of Mr C. F. Lettmayr
PO Box 22 427
GR – 55102 Thessaloniki
Greece**

Important:

***Tenderers shall inform Cedefop by e-mail (c4t-services@cedefop.europa.eu)
or fax (+30 2310 490028)***

- ✓ ***that they have submitted an offer in time, and***
- ✓ ***that they request Cedefop to confirm receipt of the e-mail or fax.***

(b) delivered by hand not later than 17:00 on 05/12/2006 to the following address:

European Centre for the Development of Vocational Training (Cedefop),
**Procurement Service
Attention of Mr C. F. Lettmayr
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece**

In this case, a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery. Cedefop is open from 9.00 to 17:00, Monday to Friday. It is closed on Saturday, Sunday and Cedefop holidays.

3. Tenders must be submitted strictly adhering to the following.

The outer envelope or parcel should be sealed with adhesive tape and signed across the seal and carry the following information:

OPEN INVITATION TO TENDER CEDEFOP No: AO/Cedefop/LT/VC/027/06 ‘Virtual Communities of Practice Platform and Related Services’ <i>Name of tenderer:</i> NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

The outer envelope must contain three inner envelopes, namely, **Envelope A, B and C**. The content of each of these three envelopes is clearly described in point 6 of the attached tender specifications.

4. Tenderers must ensure that their tenders are signed by a duly authorised representative and perfectly legible so that there can be no doubt as to words and figures.
5. Submission of a tender implies acceptance of all the terms and conditions set out in this invitation to tender, in the specifications and in the draft contract and, where appropriate, waiver of the tenderer’s own general or specific terms and conditions. It is binding on the tenderer to whom the contract is awarded for the duration of the contract.
6. The opening of tenders will take place at Cedefop on 13.12.2006, 11.00 hours (local time). Each tenderer may be represented at the opening of tenders by one person. The name of the person attending the opening must be notified in writing by fax (Fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu) at least two working days prior to the opening session.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

Before the final date for submission of tenders:

- At the request of the tenderer, the Cedefop Procurement Service may provide additional information solely for the purpose of clarifying the nature of the contract. Any request for additional information must be made in writing by fax (fax No +30 2310 490 028) or by e-mail (C4T-services@cedefop.europa.eu).

Request for additional information received less than five working days before the closing date for submission of tenders will not be processed.

- The contracting authority may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tender.

Any additional information, including that referred to above, will be published on Cedefop’s website. Please ensure that you visit regularly the site for updates.

After the opening of tenders:

- If clarification is required or if obvious clerical errors in the tender need to be corrected, the contracting authority may contact the tenderer provided the terms of the tender are not modified as a result.
8. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon signature of the contract with the successful Tenderer.
 9. All costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.
 10. Up to the point of signature, the contracting authority may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. This decision must be substantiated and the tenderers notified.
 11. All tenderers will be informed in writing of the results of this tender procedure.

Yours sincerely,

signed Christian F. Lettmayr
Deputy Director

Attached: tendering specifications

OPEN INVITATION TO TENDER

AO/Cedefop/LT/VC/027/06

**‘Virtual Communities of Practice Platform
and Related Services’**

Tendering specifications

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Introduction to CEDEFOP

The European Centre for the Development of Vocational Training (Cedefop) is an agency of the European Union. Created in 1975 with a tripartite Governing Board, it provides services for the European Commission, the European Union Member States and the social partners as well as for the associated countries of Norway and Iceland. The candidate countries are also associated with its activities.

As the European Union's reference centre for vocational education and training, Cedefop provides policymakers, researchers and practitioners with information to promote a clearer understanding of developments and so enable them to take informed decisions on future action. Cedefop assists the European Commission in encouraging, at Community level, the promotion and development of vocational education and training.

The main tasks of Cedefop as defined in its founding Regulation are to:

- compile selected documentation and analysis of data;
- contribute to the development and coordination of research;
- exploit and disseminate useful information;
- encourage and support a concerted approach to vocational training development issues;
- provide a forum for a wide and diverse audience.

Cedefop's medium-term priorities for 2006-08 concentrate on the priorities set out in the Maastricht communiqué, which has been agreed by 32 countries, the European Commission and the European social partners:

- a) 'promoting the image and attractiveness of the vocational route for employers and individuals to increase participation in VET;
- b) achieving high levels of quality and innovation in VET systems to benefit all learners and make European VET globally competitive;
- c) linking VET with the knowledge economy's requirements for a highly skilled workforce and especially, because of the strong impact of demographic change, the upgrading and competence development of older workers;
- d) addressing the needs of the low-skilled (about 75 million people aged between 25 and 64 in the EU) and disadvantaged groups so as to achieve social cohesion and increase labour market participation.'

More information about Cedefop can be found on its website: <http://www.cedefop.europa.eu>

1 Overview of this tender

1.1 Description and type of the contract

The specifications and requirements in this document constitute a call for tenders for the provision of a web software platform, which will be hosted by the provider, for supporting distributed international communities of practice to allow continuation and evolution of Cedefop's "virtual communities" service.

The aim is to allow continuation and evolution of Cedefop's Virtual Communities Service for the next two to four years.

Please refer to annex J for a glossary of terms used in this call for tenders.

This call will result in the signature of a framework contract between the successful tenderer and Cedefop. This framework contract lays down the legal, financial, technical and administrative provisions governing the relations between Cedefop and the contractor during the period of its validity. Orders will be placed by means of specific agreements or order forms attached to the framework contract.

The framework contract will also be open for the use of the European Commission (DG Education and Culture) for the support of various activities in relation to the Education & Training 2010 work programme or other needs.

A draft framework contract can be found in Annex B.

Notice: Signature of the framework contract does not place Cedefop under any obligation whatsoever to place order forms or specific agreements.

1.2 Place of delivery or performance

The majority of the tasks must be completed on the contractor's premises as a hosted web platform solution is required.

1.3 Division into lots

This invitation to tender is not divided into lots.

1.4 Variants

Tenderers **may not offer** variant solutions to what is requested in the technical specifications.

1.5 Value or quantity of purchase

The yearly budget to be allocated for the required hosted software licenses and services and the related small development services, for the support of Cedefop's Virtual communities and the support of the needs of the European Commission (DG EAC) in relation to various activities of the Education & Training 2010 work programme, is estimated to vary between the indicative amount of ca 25.000 € and ca 50.000 € per year summing up to about 200.000 € maximum for the four year maximum duration. Estimated total expenditure over 4 years is between 140.000-200.000 EUR.

The precise distribution of this amount over the period of 2+1+1 may not be even as it depends on factors not easy to quantify at this time (see below).

This is estimation only, based on the experience so far and the prospected developments of the Virtual Communities (VC) service. Amounts cannot be calculated with accuracy due to the following facts: a) there is no criterion allowing to predict future success or expansion needs of

the VC service, b) budgetary issues of the Center, c) the so far observed fluctuation of the demographics of participants, d) potential introduction of new VC's by DG EAC, e) wide variety of licensing schemes observed in the market, f) it is very difficult to predict the exact number of users for each VC as this number largely depends on the level of success and popularity of a given VC; success may boost the number of users, dissatisfaction may decrease it etc.

It is important to note that the estimates are only indicative and do not constitute a legal obligation for Cedefop.

In §5.4 a usage scenario is provided which shall be used as a basis for the financial offer and evaluation.

1.6 Validity of tenders

Tenderers must maintain their validity of their tender for at least 6 months following the tender submission date.

1.7 Duration of the contract

The framework contract shall enter into force on the date of signature of the last contracting party, i.e. Cedefop and shall be valid for a period of 24 months and may be renewed two times for an additional period of 12 months, covering an acquisition period of total 48 months. Any renewal will be subject to an amendment to this contract.

1.8 Main terms of financing and payment

Payments will be made 30 days after submission of invoices and at the conditions set out in the draft contract.

2 Technical specifications

2.1 Purpose and scope

The purpose of this invitation to tender is in to conclude a framework contract with one supplier for acquiring:

1) a turn-key online web platform hosted by the provider, offering collaborative and online community services and functionality in the field of virtual (online) distributed communities of practice. “Hosted by the provider”, means inclusive the maintenance efforts required to maintain the hosting facilities (hardware, software, middleware etc.) in operative condition in order to keep the provided web platform running.

2) a limited amount of tailor-made integration services (data migration, possible minor custom developments for customised extensions etc.)

The aim is to acquire a mature, hosted, communities of practice web environment in order to host and support Cedefop’s Virtual Communities (VC) Web service for the next two to four years, in accordance with the Technical Specifications given and the draft framework contract (see annex B).

Because of the close cooperation of Cedefop and the Directorate General of Education and Culture (DG EAC) of the European Commission, the acquired platform will also be open for the use of DG EAC to support various activities in relation to the Education & Training 2010 work programme.

Detailed description of products and services demanded can be found in §2.4 and the technical evaluation questionnaire.

2.2 General objective of the Virtual Communities initiative

Virtual communities are an initiative of Cedefop in order to foster online collaboration, exchange and communication of knowledge between stakeholders and to collect valuable information in various subject areas (Vocational Education and Training, lifelong learning, skills, qualifications, specific projects etc.).

The main objective is to bring together moderated **communities of practice in a virtual online community space** in order to build relationships, share best practices and allow collaborative knowledge and information sharing in the areas of interest involving parties from diverse locations in Europe.

2.3 Current situation

Today about 15 Virtual communities (VC’s) are operative (number of registered users). Below are the titles of current CEDEFOP’s Virtual communities:

- CEDEFOP Virtual Community Leaders (199)
- Credit Transfer In VET - European Qualifications Framework (609)
- eLearning - A European Observation System (98)
- Europass Implementation Virtual Community (101)
- European e-Skills Forum (543)
- Lifelong Guidance (469)

- Non-formal and Informal Learning (995)
- Quality Assurance in VET (611)
- Sectoral approaches to LLL (327)
- Education and Training 2010 Coordination Group, ETCG (50)
- Training of Trainers Network (1312)
- EU Knowledge System for Lifelong Learning (116)
- Cedefop Governing Board (121)
- Leonardo da Vinci Forum (98)
- European Agencies (6)

The total number of unique participants is around 5000.

Because of the expiration of the present contract, Cedefop invites tenderers to propose a platform, which allows it to continue the present Virtual Communities and create new communities if needed. The migration to a new platform should be as smooth as possible and with minimum user annoyance.

As already mentioned, the Directorate General of Education and Culture of the European Commission may also use the acquired system for virtual communities of DG EAC.

You can see the Cedefop VC's in operation visiting the site www.trainingvillage.gr and login as a guest in VC's that allow such a visit, e.g. <http://communities.trainingvillage.gr/nfl>.

2.4 Requirements

➤ Description of software and services to be provided

The successful contractor will be required to provide a **complete turn-key solution** in order to assure continuity of the Virtual Communities (VC's). This solution must provide similar core functionalities and allow smooth migration of users and content from the present to the future platform. It is necessary to combine the provision of an established and reliable platform/product in the field of virtual online communities capable of covering the needs of the VC service during the following two to four years with suitable and effective migration services of the currently operative VC's. The offered web community platform must be offered as a hosted service in order to be operational immediately. Specifically (see Questionnaires in annex G for details of the technical requirements):

- (1) The provision, setup and licensing (for at least two years, renewable two times for a one year period) of a well established, mature, hosted by the provider, software product (web platform) in the field of virtual (online) communities of practice. The system must include the hosting services, and maintenance of the service, as well as performance management and troubleshooting in case of platform failures;

- (2) A limited amount of related tailor-made integration services, that must include obligatory migration services of current Cedefop VC data, possible LDAP integration services and may also include minor possible custom development services for limited customisations. The offer must include (see technical evaluation questionnaire) a work plan addressing the migration of data of the current operational Virtual Communities platform in the time span of 1 month (see details in technical questionnaire). The current platform offers a facility to export content in form of XML files (an example set of export files are at the disposal of each tenderer). Beyond the migration of the content, it is a plus for the successful tenderer to also be able to create a single sign on procedure between the VC's user communities and LDAP user directories or other user bases. This would facilitate integration between the VC system acquired and existing or upcoming Cedefop portals like the European Training Village (ETV – www.trainingvillage.gr).

Please refer to Questionnaire 2 in annex G for detailed specifications and requirements.

2.5 Travel expenses

The Contractor will be required to attend meetings (teleconferencing and videoconferencing included) convened by Cedefop in order to establish the state of progress of work already completed and, where appropriate, to change the subsequent course of the work in the light of the results achieved. Except where otherwise provided by the Contract, travel and subsistence expenses shall be payable by Cedefop (and in accordance with Cedefop's rules for such reimbursements).

3 Specific information concerning participation to this tender

Tenderers must meet the exclusion and selection criteria and have the legal position to allow them to participate in this tendering procedure.

3.1 Exclusion criteria

Participation to this tender is only open to tenderers who are not in one of the situations listed below:

- a) 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;
- b) have been convicted of an offence concerning their professional conduct by a judgement which has the force of res judicata;
- c) have been guilty of grave professional misconduct proven by any means which the contracting authority can justify;
- d) have not fulfilled 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) have been the subject of a judgement which has the force of res judicata for fraud, corruption, involvement in a criminal organization or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, they have been declared to be in a serious breach of contract for failure to comply with their contractual obligations.

In addition to the above, contracts may not be awarded to tenderers who, during the procurement procedure:

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

Means of proof required

The tenderer shall provide the self-declaration found in Annex C which states that none of the aforementioned grounds for exclusion applies to the tenderer.

In case of recommendation for contract the tenderer may be requested to provide the following documentation: Cedefop will accept, as satisfactory evidence that the tenderer is not in one of the situations described in point a), b) or e) above, production of a recent extract from the judicial record or, failing that, a recent equivalent document issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.

Cedefop will accept, as satisfactory evidence that the Tenderer is not in the situation described in point d) above a recent certificate issued by the competent authority of the State concerned. Where no such certificate is 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/her country of origin or provenance.

Cedefop reserves the right to check the situation described in points c) and f).

3.2 Selection criteria

The tenderer must submit evidence of their economic, financial, technical and professional capacity to perform the contract.

Economic & Financial capacity

Requirement

- The tenderer must be in a stable financial position and have the economic and financial capacity to perform the contract.

Proof of economic and financial capacity may in particular be furnished by:

- a statement of overall turnover and turnover concerning services covered by the contract during the last three financial years.

And at least one of the following two documents:

- balance sheets or extracts from balance sheets for at least the last three years for which accounts have been closed (where publication of the balance sheet is required under the company law of the country in which the economic operator is established);
- appropriate statements from the banks or evidence of professional risk indemnity insurance;

In case tenderers are unable to furnish such documents they are required to provide solid justification for non provision.

Please see and complete the attached Questionnaire 1 (Selection Criteria in Annex G)

Technical and professional capacity

These criteria relate to your skill, efficiency, experience and reliability in similar circumstances (performing similar contracts, supplying such services). The Tenderer must prove the ability to provide the required hosted software services and present an experience record of delivering mature software and services solutions for the support of distributed international online communities of practice. Proof of enrolment in the relevant professional register, as prescribed by the laws of the Country where the tenderer is established, is required.

Please see and complete the attached Questionnaire 1 (Selection Criteria in Annex G).

Please note that, should the tenderer be awarded a contract, the answers to the questionnaires are binding and fully part of the tenderer's offer and as such also part of the contract.

3.3 Legal Position

Tenderers are requested to complete the Legal entity form found in Annex D and to provide the documents requested in the form. Tenderers must ensure to include the name and function of the individual(s) entitled to sign on behalf of the organisation in the case of contract award.

4 Additional information concerning participation to this tender

4.1 Participation of consortia

Groupings of suppliers (or consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. Such groups (or consortia) must specify the company or person heading the project and must also submit a copy of the document authorising this company or person to submit a tender.

In addition, each member of the consortium must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria 'technical and professional capacity', the

evidence provided by each member of the consortium will be checked to ensure that the consortium as a whole fulfils the criteria.

If awarded, the contract will be signed by the company or the person heading the project who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract. Tenders from consortia of firms or group of service providers, contractors or suppliers, must specify the role, qualifications and experience of each member or group.

4.2 Subcontracting

Any subcontracting must be approved by Cedefop, either by accepting the tenderers proposal, or, if proposed by the Contractor after contract signature, by an exchange of letters. The subcontracting will be accepted only if it is judged by Cedefop to be necessary to complete the project, and does not lead to distortion of competition. If awarded, the contract will be signed by the tenderer who will be the only contracting party responsible for the performance of the contract.

The tenderer must indicate clearly in its methodology, which parts of the work will be sub-contracted, and the identity of all subcontractors undertaking more than 10% of the work by value.

All subcontractors must meet the selection criteria 'technical and financial capacity' and provide the necessary evidence.

If no sub-contracting is proposed, it is assumed that the work will be carried out directly by the tenderer.

5 Award of the contract

Only the proposals of tenderers meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price.

The contract shall be awarded to the tenderer submitting the tender which offers the best-value-for-money (best quality-price ratio).

A quality-price ratio will be calculated for each tender by dividing the total points for quality (TQV) by the total financial offer price (TFO), thus indicating which tender represents the best value for money.

5.1 Technical evaluation

The following technical award criteria will be applied to this tendering procedure:

- Award criteria 1 – The quality of the offered platform for virtual communities and related services (migration, integration, support, hosting etc.) and their conformity with the specifications laid out in part B and C of Questionnaire 2 in annex G (65 points);
- Award criteria 2 – Hands on testing of a demo platform for assessing factors such as user friendliness, look and feel and ease of collaboration and nativity. Part D of Questionnaire 2 in annex G (30 points);
- Award criteria 3 – The overall presentation of the offer, overall adherence to the requirements, general conformance to the terms and conditions of the present call, content thoroughness, precision and formal completeness. Related generic question in Part A of Questionnaire 2 in annex G (5 points).

Tenders scoring less than 65 points in the total technical quality value (TQV) of a maximum of 100 against the technical criteria, will not be considered acceptable and will therefore be excluded.

5.2 Technical proposal

The assessment of the technical quality will be based on the ability of the tenderer to meet the purpose of the contract as described in the technical specifications and detailed in Questionnaire 2 (annex G). To this end, the tenderer must provide the following documents and/or information to allow evaluation of their offer according to the technical criteria mentioned above:

- Completed Questionnaire 2 (technical evaluation criteria) together with the supportive material.
- In order for Cedefop to be able to test maturity level of the product and in particular relevance to communities of practice services and collaboration, user friendliness, performance, overall ease, administrative flexibility and ease of use, each tenderer must provide login credentials to a prototype test environment of the offered platform where main features can be tested.

In addition to the above the tenderer must provide the information concerning subcontracting as requested in point 4.2.

5.3 Financial evaluation

Only tenders scoring 65 points or more (of a maximum of 100) points against the technical award criteria will have their financial proposal evaluated. The financial evaluation will be made on the basis of the prices offered.

5.4 Financial proposal

The financial offer will be calculated with a 3 year utilisation scenario. Please complete Questionnaire 3 in annex G.

• Estimated usage scenario

The estimations used in the scenario will assume the continuation of the current situation for 1 year and the evolution of the numbers of new communities and new users for the following 2 years. An estimation of the use of the system by DG EAC is also included in the utilisation scenario. If different licensing schemes or additional costs are applied by the tenderer (e.g. charges based on traffic, usage etc.) the tenderer must in his financial offer make an estimation of those costs and include those in order to calculate a total binding price offer for the following scenario. Calculations should be easy to understand.

Index	Present situation – 1 st year (estimation for DG EAC usage added)	Yearly variation (2 nd , 3 rd years)
Number of unique users	5500 (Cedefop and DG EAC)	+ 15% each year
Number of current total space usage	1100 MB (Cedefop and DG EAC)	+ 20% each year
Number of Virtual Communities	17 (Cedefop and DG EAC)	+ 2 communities/year
Usability measures	80000 pageviews / year or ~ 8 GB traffic / year (Cedefop and DG EAC)	+ 15% each year
Comment: A page view is counted each time a member visits a new page in a community		

Needs for tailor-made integration services (data migration, minor custom development for customised extensions etc.) are estimated for the purpose of the financial evaluation to about 30 man days in the three years period.

Table 2 –Financial Offer

The financial proposal should indicate the total price in order to carry out all the activities indicated in the technical specifications. The tenderers must present a detailed breakdown of the price offered.

From the financial offer of the tenderers the licensing scheme must be clear. In order to compensate for differences in licensing and pricing schemes for the assessment of offers, the estimated usage scenario in §5.4 will be used for comparing the financial offers.

E = Total cost (licensing, hosting, maintenance etc.) of the three years estimated usage scenario excluding the cost of the estimated service person-days for migration and tailor-made integration and development services.

W= Price of person-day for migration, tailor-made integration and minor development services of custom expansions.

Total Financial Offer (TFO) = E + 30*W

Please see also and complete the *Form of submission of the Financial offer (Questionnaire 3 in annex G)*

Information concerning price

- The prices quoted must be fixed and not revisable for the first two years of the contract. From the third year of the contract prices may be revised as specified in the draft contract.
- Prices must be quoted in euro and include all expenses.
- Travel expenses for any meetings with Cedefop arising from this procedure should not be included in the tender and are subject to Cedefop's prior agreement. Such travel costs and per diems will be paid separately (see point 2.5).
- Under article 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities, Cedefop is exempt from all charges, taxes and dues, including value added tax (VAT). Therefore, such charges may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately see point 5.4.

6 Information on presentation and content of tender

It is important that tenderers present their tender in the correct format and provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should note the instructions indicated in the invitation letter of this tender.

In addition, tenderers can find further details of the required documentation in the following.

6.1 Envelope A - Supporting documents

One original and one copy of:

- the checklist of Annex F

- the exclusion criteria declaration as requested in point 3.1, see standard template in Annex C
- the selection criteria documents as requested in point 3.2 and in Questionnaire 1
- the legal entity form as requested in point 3.3 and as presented in Annex D
- a statement containing the name and position of the individual(s) entitled to sign the contract
- the financial identification form of Annex E

6.2 Envelope B – Technical proposal

One original signed unbound copy and four bound copies of:

- the technical proposal providing all information requested in point 5.2 and in Questionnaire 2 including information relevant to subcontracting as requested in point 3.2

6.3 Envelope C – Financial proposal

One original signed unbound copy and four bound copies of:

- the financial proposal containing all information requested in point 5.4 and in Questionnaire 3.

ANNEX A

CONTRACT NOTICE

ANNEX B

DRAFT CONTRACT

ANNEX C

DECLARATION ON EXCLUSION CRITERIA

I hereby declare that neither I nor the company:
(Company Name).....

that I am representing are in any of the situations mentioned below:

- a) is bankrupt or being wound up, is having his/her affairs administered by the courts; has entered into an arrangement with creditors; has suspended business activities; is the subject of proceedings concerning those matters; or is in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) has been convicted of an offence concerning his/her professional conduct by a judgement which has the force of *res judicata*;
- c) has been guilty of grave professional misconduct proven by any means which Cedefop can justify;
- d) has not fulfilled 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 he/she is established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) has been the subject of a judgment which has the force of *res judicata* for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the Community budget, he/she has been declared to be in serious breach of contract for failure to comply with his/her contractual obligations.

I, the undersigned, understand that contracts may not be awarded if during the procurement procedure the individual/company/organisation mentioned above:

- is subject to a conflict of interest;
- is guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information.

Signature:

Date:

ANNEX D

LEGAL ENTITY FORM

(to be downloaded, depending on the nationality and legal entity of the tenderer, from the following website)

http://europa.eu.int/comm/budget/execution/legal_entities_en.htm

ANNEX E

FINANCIAL IDENTIFICATION FORM

(to be downloaded, depending on the nationality of the tenderer, from the following website)

http://europa.eu.int/comm/budget/execution/ftiers_en.htm

ANNEX F

CHECK LIST OF MANDATORY DOCUMENTS

The checklist must be used to ensure that you have provided all the documentation for this tender and in the correct way. This checklist should be included as part of your offer.

Please Tick ✓ the boxes provided

<u>Mandatory and recommended documents to be included as part of the tender</u>	Reference paragraph	Included		If the document is not included, please provide an explanation for the reason
<u>Envelope 'A' must contain</u> One original and one copy of: This checklist (recommended)		Yes	No	
		☐	☐	
exclusion criteria declaration (If applicable, including those of the members of the consortium)	3.1 & 4.1	☐	☐	
selection criteria documents (If applicable, including those of the members of the consortium and relevant subcontractors)	3.2 , 4.1 & Questionnaire 1	☐	☐	
legal entity form	3.3	☐	☐	
name and position of the individual(s) entitled to sign contract	3.3	☐	☐	
financial identification form	6.1	☐	☐	
<u>Envelope 'B' must contain</u> one original and four copies of:				
the technical proposal.	5.2 & Questionnaire 2	☐	☐	
<u>Envelope 'C' must contain</u> one original and four copies of:				
The financial proposal	5.4 & Questionnaire 3	☐	☐	

Please note that:

☐	offers must be formulated in one of the official languages of the European Union.
☐	both the technical and financial proposal of the offer are signed by the tenderer or his duly authorised agent.
☐	the offer is as clear as possible in order to rule out any ambiguity.
☐	the offer and its respective parts are properly attributed to the envelopes A, B and C as described above
☐	the outer envelope bears the information as outlined in point 3 of the invitation letters to tenderers

ANNEX G

QUESTIONNAIRES

- **SELECTION CRITERIA**
- **TECHNICAL EVALUATION**
- **FINANCIAL OFFER**

Note: Mandatory questions

At several points in the Questionnaires, you will see the mention "Mandatory". Particular attention should be paid to such questions for which a positive answer is mandatory. Indeed, if a positive answer is **not given** to any such question, the tenderer may be eliminated from the evaluation procedure. Should there be any objection to these mandatory questions, the tenderer must contact the Cedefop immediately and before the deadline for submission of tenders.

QUESTIONNAIRE 1: Selection Criteria (MANDATORY)

	Questions relating to the selection of the Tenderer	Brief response or reference
	<i>Economic and financial capacity</i>	
1.	Have you enclosed a statement stating the total turnover and turnover of services of the type which is the subject of this call for tenders for the past three (3) financial years? Mandatory	☐ YES Reference
2.	a) Have you enclosed official or certified true balance sheets or extracts from balance sheets for at least the last three years for which accounts have been closed, or equivalent documentation? (e.g. where company law in the country in which you are established does not require you to publish your balance sheet) (If this question can not be positively answered the following question becomes mandatory)	☐ YES ☐ NO Reference
	b) Have you enclosed appropriate evidence from the bank or evidence of professional risk indemnity insurance?	☐ YES ☐ NO Reference
	<i>Technical and professional capacity (all following questions are mandatory)</i>	
	- Professional capacity and standing, in evidence of which the tenderer shall furnish:	
3.	A recently certified proof of enrolment in the relevant professional register, as prescribed by the laws of the Country where the tenderer is established.	☐ YES Reference
	- Data Ownership Assurance	
4.	Do you confirm that CEDEFOP keeps ownership and all rights on its own data stored in your facilities on the hosted virtual communities platform offered?	☐ YES
	- Technical competence and suitability of the company, organisation and structure available for the services and products covered by this call for tender, in evidence of which all the following documentation shall be furnished:	
5.	Have you enclosed a list of contracts performed during the past three years (3) similar to the scope, size and nature as those required in this call for tender (covering the needs of Virtual (online) Communities of Practice, international clients etc.)? For each project, please indicate: (1) Contract reference (2) Start date (mm/yy) (3) Finish date (mm/yy) [Actual / planned] (4) Client name (indicate private/public sector) (5) Contact person : name, phone, email (6) Project size (project amount, number of users participating in the virtual community of practice) (7) URL of website if available You can use the attached Project Reference Form in annex H (additional information may be nevertheless included)	☐ YES Reference ..

6.	In order to certify experience of the company with the requested kind of software products and services and its ability to offer a mature solution please indicate online communities of practice projects and customers that have used the platform before 2004 (2004 included). Use any facts and documents to prove that you have offered communities of practice web platforms and tools at least for two years. You can use the same project form as above.	☐ YES Reference
7.	Have you enclosed a description of your hosting facilities, equipment, tools and organisation, in order to prove that you are capable to provide qualitative and reliable web hosting services? If you can provide several quality levels of hosting service please describe shortly, indicating which one is offered in response to this call for tenders.	☐ YES Reference
8.	Have you enclosed a specific brief description of the organisational structure of your technical and support divisions?	☐ YES Reference
	- Communication	
9.	Do you commit that for any request or question by Cedefop, you will respond with an acknowledgment message, giving short comment and estimate of when the issue can be resolved/answered, within maximum two (2) working days?	☐ YES Reference
10.	Does the company undertake that all communication with Cedefop can be done in English?	☐ YES

QUESTIONNAIRE 2: Technical Evaluation Criteria Checklist

All questions will be evaluated based on the technical description of the solution as provided by the tenderer.

A	Questions relating to the presentation of the offer (5 points)	Brief response or reference
1.	Have you taken care of the overall presentation of the offer, its overall adherence to the requirements, general conformance to the terms and conditions of the present call, content thoroughness, precision and formal completeness?	☐ YES ☐ NO Reference
B	Migration Project – Integration works (15 points)	
2.	Do you confirm that in case you will be the successful tenderer you are able to migrate all the user accounts and at least 70% of the content of the current 15 Cedefop Virtual Communities into the offered platform in a time span of one (1) month? (Please take into account the exported sample files from the current system that are published together with the tendering documents on Cedefop's web site) MANDATORY	☐ YES ☐ NO Reference
3.	Please provide an estimation of an upper-bound of paid service person-days needed to migrate the whole content of the 15 existing communities.	Reference
4.	Have you provided a description of your envisaged technical approach and methods to carry out the migration work and meet the technical specifications?	☐ YES ☐ NO Reference
5.	Can you provide an implementation of a single sign on procedure for the users of the offered Virtual Communities (VC's) platform and other (based on LDAP or other database) user base (user directory)?	☐ YES ☐ NO Reference
6.	Please provide an estimation of an upper bound of service person-days needed to implement such a single sign on procedure with an existing LDAP database.	Reference
7.	Please describe briefly the kind, nature and limits of paid customisation services you can provide (if this is the case) after initial setup of the offered Virtual Communities of practice platform.	Reference
C	Questions relating to the quality of the offered software platform (50 points)	Brief response or reference
	- General features of the platform –Does the offered platform support the following features? Answer yes or no and where appropriate add a reference to a description of the functionality.	
8.	Can the content stored in the web community platform be hidden from search engines? (content should be searchable only by members of the community)	☐ YES ☐ NO Reference
9.	Does the platform allow the customised branding and look and feel of the Virtual communities? E.g. can a customised Cedefop banner and logo be placed? MANDATORY	☐ YES ☐ NO Reference
10.	Does the platform provide summarising front pages (overview)? The home page of each community should summarise all the activity in the community grouped according to the different areas. Users should be able to access most recent content added in every section from the home page without much navigation. MANDATORY	☐ YES ☐ NO Reference

11.	Does the platform include at least administrative tools for: - user account management, - content management, - communication features i.e. mass e-mailing etc. - security settings and - layout settings? MANDATORY	☐ YES ☐ NO Reference
	- Community Tools & Features - Is the offered platform supporting the following features ? Answer yes or no and where appropriate add a reference to a description of the functionality.	
12.	File and document management offering at least the following (if your system provides additional functionalities please reference): Store and share any kind of computer file- word documents, pdf files, software, video and audio files. Version control management. Ability to cross reference and moderate files. MANDATORY	☐ YES ☐ NO Reference
13.	Custom Databases (lists, infolog) facility. Provide user updatable databases to collect and share structured information i.e. lists, tasks, useful links, events etc. Ability of user defined fields and saved views. Ability to cross reference and moderate databases. MANDATORY	☐ YES ☐ NO Reference
14.	Article and generic content contribution facility in html format. Capability to store and publish news, articles, stories, press releases, html pages without losing their formatting. WYSIWYG editor facility for new content. Internal and external links to be referenced. Ability to cross reference and moderate articles. Support of version control management. MANDATORY	☐ YES ☐ NO Reference
15.	Threaded discussions boards. Providing an automated way to centralise conversations and storing them for future reference. Producing threaded view of discussions topics and summaries. Members may be able to select to receive discussion replies through their e-mail while content still remains to be stored on the VC. Discussion topics may include attachments or reference to files stored in the system. Ability to cross reference and moderate? MANDATORY	☐ YES ☐ NO Reference
16.	Mailing lists capability. Do you Provide mailing lists to enable traditional e-mail based discussions with the benefit of community archiving and searching? Ability to be cross-referenced and moderated?	☐ YES ☐ NO Reference
17.	Event calendar facility. Allow storage of time-sensitive information i.e. meetings, reminders, events, project milestones in one or multiple calendars per VC. Ability to be cross-referenced and moderated. MANDATORY	☐ YES ☐ NO Reference
18.	Community “Wiki “ functionality. Please describe shortly if available.	☐ YES ☐ NO Reference
19.	Community “Blog” functionality. Please describe shortly if available.	☐ YES ☐ NO Reference
20.	Community image gallery facility. Ability to easily store and share images in albums. Possibility of automated slide shows?	☐ YES ☐ NO Reference
21.	Community polls facility. Provide ability to easily organise opinion polls for gauging opinions, agreeing on meeting times etc with a fixed start and close date. Votes should be tabulated in real-time. Capability to collect anonymous or named votes is considered a plus.	☐ YES ☐ NO Reference
22.	Provision of an area allocated for brief announcements and informal discussion or to draw attention to new content e.g. virtual note board. Ability for notes to be cross-referenced and moderated	☐ YES ☐ NO Reference

23.	Online Presence Indicator. An indicator showing who is logged on in real-time.	☐ YES ☐ NO Reference
24.	Community Messenger integrated with the community. It must be easy to initiate conversation with other community users who are on line.	☐ YES ☐ NO Reference
25.	Chatting facility. Provide a chat function for synchronous communication between logged on members of the community. Provide chat rooms that allow group meetings in real-time. Preferably without the need of additional software to download or install.	☐ YES ☐ NO Reference
26.	Users list. Capability to view a detailed member list in order to review community membership and show information on last login and joining dates. MANDATORY	☐ YES ☐ NO Reference
27.	Invite new users capability. All members must be given the option to send invitations to other interested parties to join the community. MANDATORY	☐ YES ☐ NO Reference
28.	Is there a tracking system of invitations sent?	☐ YES ☐ NO Reference
29.	Subsystem to receive feedback from users. Provide a feedback channel, for members to contact community administrators	☐ YES ☐ NO Reference
- Other Functionality – Technology assessment		
30.	Please describe shortly the development technology used for the product and benefits gained from this technology. Mention issues such as expandability, application architecture, client browser compatibility.	Reference
31.	Does your platform require any extra software installation in the client computer? If yes please analyse.	☐ YES ☐ NO Reference
32.	Please describe shortly the user interface of the offered community platform. Do you provide ease-of-use and the ability of community participants with basic web surfing knowledge to make use of the community without training?	Reference
33.	Does the platform provide a search facility? Please describe the search interface allowing users to have instant access to content. Mention any additional advanced features to refine search. MANDATORY	☐ YES ☐ NO Reference
34.	Does the platform provide integrated RSS Feeds so that members can be notified of changes within their communities?	☐ YES ☐ NO Reference
35.	Does the platform allows users to rate (apply a rating value) the various content items?	☐ YES ☐ NO Reference
36.	Does the platform provide facilities and API's (for example web service API etc.) so it can integrate with external systems? Please describe.	☐ YES ☐ NO Reference
37.	Does the platform provide basic document management facilities like Check-in/Check-out, version tracking and content revisions without overwriting past versions?	☐ YES ☐ NO Reference
38.	Can content be submitted on demand via e-mail? E.g. can members select to receive discussion replies through their e-mail, while content still remains to be stored on the VC.	☐ YES ☐ NO Reference
39.	Do you support a multilingual interface? Does it give the possibility to publish and view content in all EU official languages?	☐ YES ☐ NO Reference

40.	Does the system provide a personalised view for each member on all pages containing content, in particular with read, not read information? Can new or unread items of content appear flagged? Can users clear these indicators?	☐ YES ☐ NO Reference
41.	Does the platform provide the ability to users to receive an automatically send e-mail notification on new content on the community? Is this facility controlled by the users (e.g. frequency of dispatch of this e-mail etc)? MANDATORY	☐ YES ☐ NO Reference
42.	Does the platform allow easy interlink of community content and folders? E.g. can related content be referenced easily? The interface for selecting related items should be self-explanatory and user friendly. MANDATORY	☐ YES ☐ NO Reference
43.	Do you provide a community previewing capability? To enter a community members should normally login. However, could it be possible for visitors (guests) to view some of the content of the community without being registered?	☐ YES ☐ NO Reference
44.	Is there an ability of content moderation provided across all subsystems and tools? It should be possible to hide unapproved content until approved. MANDATORY	☐ YES ☐ NO Reference
45.	Does the web interface comply with the W3C's Web Content Accessibility Guidelines (WCAG)?	☐ YES ☐ NO Reference
- Administration features		
46.	Does the platform provide multiple levels or roles of administration to ensure proper amount of delegation for efficient management? E.g. general administration to manage the software installation and the definition of a web space and site (e.g. community) administration to oversee a group of users and communities within a single domain or site. MANDATORY	☐ YES ☐ NO Reference
47.	Does the platform allow for easy export of the content? If yes please answer the following questions: Do you support export to xml files? How you manage uploaded files when exporting? Is the exporting of data easy to use? Give more details if necessary. MANDATORY	☐ YES ☐ NO Reference
48.	Does the platform provide the possibility for a customised community name, alias, description, welcome message etc. for each independent site? MANDATORY	☐ YES ☐ NO Reference
49.	Does the platform provide the possibility to enable or disable the different subsystems, tools and functions, present them in the required order in the home page and rename those as desired? MANDATORY	☐ YES ☐ NO Reference
50.	Does the platform allow the easy addition of custom navigation buttons on the navigation menu of the site, leading to other web-based resources	☐ YES ☐ NO Reference
51.	Does the platform support the creation of different member subgroups (working areas) in each community with varying access rights to the different content of the community? MANDATORY	☐ YES ☐ NO Reference
52.	Does the platform allow for archiving of old data?	☐ YES ☐ NO Reference
53.	Does the platform allow the addition of custom images, backgrounds, graphic files and flash files in order to customise the appearance of the site?	☐ YES ☐ NO Reference
54.	Does the platform allow customisation of community colour combinations of background and fonts. If yes can pre-defined templates be used?	☐ YES ☐ NO Reference

55.	Can administrators control e-mail notifications concerning new members and cancelled memberships? MANDATORY	☐ YES ☐ NO Reference
56.	Does the system provide statistical data? Please describe the information the system keeps and reports for users, content etc. MANDATORY	☐ YES ☐ NO Reference
57.	Does the system provide for various content items an indicator of the frequency this content item has been viewed?	☐ YES ☐ NO Reference
58.	New applicant's admission/approval to the community should be carried out either manually after having been reviewed by the administrator or automatically if set so initially. Do you provide this functionality?	☐ YES ☐ NO Reference
59.	The "invite new members tool", should be accompanied by tracking and management tools for the administrators that will allow them to review, revoke and resend all outgoing invitations. Do you provide this functionality?	☐ YES ☐ NO Reference
60.	Can administrators send targeted e-mails (broadcast) to one or all the member groups of one community? MANDATORY	☐ YES ☐ NO Reference
61.	Content moderation should allow administrators and content moderators to systematically review and manage (allow, delete etc) all content submitted by members and to hide or allow un-moderated items. Do you provide this functionality? MANDATORY	☐ YES ☐ NO Reference
62.	Does the system provide the possibility to have a common space for content to be shared by all communities, in order to share documents and content across communities?	☐ YES ☐ NO Reference
63.	Does the system allow community administrators to post a small text paragraph at the beginning of each discussion thread? This is to allow community administrators to summarise the different inputs received under a particular discussion thread and give the opportunity to newcomers to have a quick overview of what has been discussed.	☐ YES ☐ NO Reference
64.	Can the system automatically send out a customised (for each community) welcome message to users that have been accepted as members?	☐ YES ☐ NO Reference
- Additional features		
65.	Mention any other tools and functionality provided by your platform that has not been addressed by the questions above and you believe is of benefit in the context of virtual online communities of practice.	Reference
- Quality of hosting infrastructure that will ensure confidence in placing sensitive information online.		
66.	Do you offer flexible storage allocation across communities? E.g. can allocated storage space (in case this is a paid and/or restricted resource) in the host server be distributed to the initiated communities at will?	☐ YES ☐ NO Reference
67.	Do you provide hosting facilities with physical security to safeguard data? Do you monitor environmental conditions, provide a UPS battery backup and a fire suppression system?	☐ YES ☐ NO Reference
68.	Do you provide network security facilities of hosted services?	☐ YES ☐ NO Reference
69.	Do you provide Data Backup & Recovery services that ensure that content will not be lost in case of a disaster?	☐ YES ☐ NO Reference

	- Licensing scheme	
70.	Does your licensing policy include any discount or discount schemes in case of user number escalation e.g. above 8000 users etc.?	☐ YES ☐ NO Reference
71.	Do you offer the same software platform for Virtual communities of practice also as licensed software that can be setup and hosted in Cedefop? If yes please describe any requirements of the software in terms of hardware and software and present the relevant licensing scheme.	☐ YES ☐ NO Reference
	- Software roadmap	
72.	Please provide a description of the main provisions and a plan if available with regards to release of new versions and functionality.	☐ YES ☐ NO Reference
D	Hands on test (30 points)	
73.	Have you provided URL and login credentials to a prototype test environment of the offered platform where main features can be evaluated by Cedefop staff? MANDATORY	☐ YES ☐ NO Reference

QUESTIONNAIRE 3: Form of submission of the Financial offer

	Item	Value Or reference
	Please describe in detail your licensing and pricing scheme of the offered hosted online communities of practice web software platform indicating (if this is the case) how prices are affected by any parameters of the system (e.g. number of users, number of communities, usability etc.) . The cost of the evaluation scenario in §5.4 should be pre-calculated in order to facilitate assessment of the offers. Do not give just the price for the scenario but also show the calculations, based on the proposed licensing scheme. Please give the following prices:	
1.	Total price (licensing, hosting, maintenance etc.) of the three years estimated usage scenario (see §5.4) <u>excluding</u> the cost of the estimated service person-days for migration and tailor-made integration and development services.	
2.	Price of <u>person-day</u> for tailor-made integration services (migration of data, LDAP and/or other integration, development services of limited custom expansions etc)	

ANNEX H**PROJECT REFERENCE FORM**

Project Reference Form

Company:		PROJECT No:	
Project name:			
Client (indicate private/ public sector)			
Client contact person (name, phone, e-mail)			
Project size (euros – person-days):			
Dates (start-end):			
Project description (including relevant URLs): 			
Technologies used at the project 			
Number, type and names of staff involved 			

ANNEX J

Glossary of terms

Tender, offer, proposal and **bid** are synonymous.

Tenderer means the entity that submits a tender (offer).

The Centre or Cedefop is the European Centre for the Development of Vocational Education and Training.

The term **Contractor** means the successful **tenderer** with whom a future contract shall be, in principle, established.

Throughout this text, the terms **tenderer, respondents, suppliers, applicants** may be used interchangeably.

Mandatory: failure to respond to a mandatory question may imply the rejection of the tender.

Call for Tender and **Request for Tender (RFT)** are synonymous.

Warranty and **guarantee** are synonymous

A **Community of Practice (CoP)** is defined as: A group of individuals which may be co-located or distributed, motivated by a common set of interests, and willing to develop and share tacit and explicit knowledge. Within a domain of common interest, communities interact, learn, and build relationships in order that they may practice their skills through tools, frameworks, idea sharing, artefacts, or documents

By **Online or Virtual Communities of Practice**, we mean distributed communities of practice that perform their goal as set above by use of internet, web and e-tools and facilities.

VC is the abbreviation for Virtual Communities of practice at Cedefop. An e-service offered by CEDEFOP in order to foster cooperation and knowledge sharing in various VET related fields and policies.

VET stands for Vocational Education and Training

By **hosted platform, or hosted web services** we mean that the required functionality and e-tools to support Cedefop's virtual communities of practice will be provided by means of facilities (hardware, software, middleware etc.) residing in a location outside Cedefop's premises under the supervision of the tenderer and under the responsibility of the tenderer to maintain and support facilities and keep the services alive and running