



CEDEFOP

European Centre for the Development
of Vocational Training

Thessaloniki, 09/09/08
RS/PRO/2008/949

OPEN INVITATION TO TENDER

AO/CID/MWI/Books-Serials-Electronic resources-Press clippings/022/08

‘SUPPLY OF BOOKS, SUBSCRIPTIONS TO SERIALS, ACCESS TO ELECTRONIC RESOURCES AND PRESS CLIPPING 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 preferably in English, but in any case in one (or a combination) of the official languages of the European Union..
2. Tenders may be submitted exclusively in one of the following ways:
(a) by post to be dispatched not later than 17/10/2008 in which case the evidence shall be constituted by the date of dispatch, the postmark or the date of the deposit slip, to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaidis
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.

Do not attach your offer (or any summary thereof) to the confirmation e-mail or fax.

or

(b1) by courier service to be dispatched not later than 17/10/2008 in which case the evidence shall be constituted by the date of dispatch, or the date of the deposit slip,

or

(b2) delivered by hand not later than 17h00 on 17/10/2008, in which case a receipt must be obtained as proof of submission, signed and dated by the official in the above mentioned Service who took delivery,

to the following address:

**European Centre for the Development of Vocational Training (Cedefop),
Procurement Service
Attention of Mr G. Paraskevaidis
Europe 123,
GR-57001 Thessaloniki-Pylea
Greece
Tel: +30 2310 490111 / 490 064**

Cedefop is open from 9.00 to 17:30, Monday to Friday. It is closed on Saturday, Sunday and Cedefop holidays.

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

Tenders must be placed **in a sealed envelope**, itself enclosed within a second sealed envelope. If self-adhesive envelopes are used, they must be sealed with adhesive tape and the sender must sign across this tape.

The **outer envelope**, addressed simply to Cedefop (address depending on the means of submission, see point 2 above), should only bear additionally **the name and address** of the sender.

The **inner envelope**, addressed to the Procurement Service as indicated under point 2 above, must bear a self-adhesive label with the indication **“Open Invitation to tender – Not to be opened by the internal mail service”** and all the necessary information, as shown below:

OPEN INVITATION TO TENDER AO/CID/MWI/Books-Serials-Electronic resources-Press clippings/022/08 ‘SUPPLY OF BOOKS, SUBSCRIPTIONS TO SERIALS, ACCESS TO ELECTRONIC RESOURCES AND PRESS CLIPPING SERVICES’ Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE
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The inner envelope must also contain three sealed envelopes, namely, Envelope A – “Supporting Documents”, Envelope B – “Technical Proposal” and Envelope C – “Financial Proposal”. The content of each of these three envelopes is described in point 6 of the attached tendering specifications.

4. Tenderers must ensure that their tenders are signed by an authorised representative and that tenders are 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 29/10/2008, 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).

- **Any request for additional information/ clarification deemed necessary should be received by 09/10/2008 at the latest. No such requests will be processed after that date.**

- 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. All costs incurred in preparing and submitting tenders are borne by the tenderers and cannot be reimbursed.

9. 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.

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 candidates or tenderers notified.

10. Tenderers are informed that for the purposes of safeguarding the financial interests of the Communities, your personal data may be transferred to internal audit services, to the European Court of Auditors, to the Financial Irregularities Panel and/or to the European Anti-Fraud Office (OLAF).

Data of economic operators which are in one of the situations referred to in Articles 93, 94, 96(1)(b) and 96(2)(a) of the general Financial Regulation may be included in a central database and communicated to the designated persons of the Commission, other institutions, agencies, authorities and bodies mentioned in Article 95(1) and (2) of the same Regulation. This refers as well to the persons with powers of representation, decision making or control over the said economic operators. Any party entered into the database has the right to be informed of the data concerning it, up on request to Cedefop's Head of Finance and Procurement.

11. Processing your reply to the invitation to tender will involve the recording and processing of personal data (such as your name, address and CV). Such data will be processed pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data. Unless indicated otherwise, your replies to the questions and any personal data requested are required to evaluate your tender in accordance with the specifications of the invitation to tender and will be processed solely for that purpose by *Cedefop's Finance & Procurement Service*. You are entitled to obtain access to your personal data on request and to rectify any such data that is inaccurate or incomplete. If you have any queries concerning the processing of your personal data, you may address them to the Head of Finance & Procurement Service. You have

the right of recourse at any time to the European Data Protection Supervisor for matters relating to the processing of your personal data.

12. All tenderers will be informed in writing of the results of this tender procedure.

Yours sincerely,

G. Paraskevaïdis
Head of Finance and Procurement

Attached: Tendering Specifications

OPEN INVITATION TO TENDER

AO/CID/MWI/Books-Serials-Electronic resources-Press clippings/022/08

**‘SUPPLY OF BOOKS, SUBSCRIPTIONS TO SERIALS, ACCESS TO ELECTRONIC RESOURCES AND
PRESS CLIPPING SERVICES’**

Tendering Specifications

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Annex C:	Declaration on exclusion criteria and absence of conflict of interest
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TECHNICAL ANNEXES :

Annex I A - Selection of the tenderer Lot 1
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Annex II - Service Level Agreement SLA
Annex III A - Financial Proposal Lot 1
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Introduction to CEDEFOP

The European Centre for the Development of Vocational Training (hereinafter 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

- a) Title of the contract: "Supply of books, subscription to serials, access to electronic resources and press clipping services"
- b) Short description of content:

The call for tender covers the following supplies and services:

Lot 1: Acquisition and delivery of books and other printed monograph publications;

Lot 2: Subscription and delivery of serials;

Lot 3: Access to electronic resources;

Lot 4: Electronic press clipping services.

- c) Type of contract: framework contract

1.2 Place of delivery or performance

The address for delivery is Cedefop's address in Thessaloniki. For electronic resources access should be granted by IP to our offices in Thessaloniki and in Brussels.

1.3 Division into lots

This invitation to tender is divided into the following four lots:

- **Lot 1: Acquisition and delivery of books and other printed monograph publications;**
- **Lot 2: Subscription and delivery of serials;**
- **Lot 3: Access to electronic resources;**
- **Lot 4: Electronic press clipping services.**

Tenderers may submit tenders for one or more lots. Please note that in the case where you tender for more than one lot, a separate tender must be made for each lot. Each individual lot will be examined separately.

1.4 Variants

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

1.5 Value or quantity of purchase

Estimated budget available for this activity is 107 000 EUR/year (excluding VAT).

Estimated total expenditure is 428 000 EUR (excluding VAT) over 4 years.

Estimated quantity of purchase is:

- **Lot 1:** approximately 300 titles per year, including reference works and monographs; the annual volume is estimated at 30 000 EUR.
- **Lot 2:** approximately 160 hard-copies of serials, annuals, including a current order for 13 copies of daily newspapers and 4 weekly magazines, plus some serials published exclusively in electronic form – online; the annual volume is estimated at 40 000 EUR.
- **Lot 3:** several databases; the annual volume is estimated at 20 000 EUR.
- **Lot 4:** the annual volume for electronic press clipping services is estimated at 17 000 EUR.

1.6 Validity of tenders

Tenderers must maintain the validity of their tender for at least 6 months following the deadline for submission of tenders, i.e 17/03/2009.

1.7 Duration of the contract

The contract for each lot 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 12 months, automatically renewable three times, each for an additional period of one (1) year, to a maximum period of four (4) years (1+1+1+1).

1.8 Main terms of financing and payment

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

2 Technical specifications

2.1 Introduction

Our multilingual collections contain research reports, legislation, statistics and comparative studies. The topics covered are those included in the *Education and training 2010 agenda* such as: training systems, recognition of qualifications, professional occupations, vocational guidance, lifelong learning and the training of trainers.

The target groups are: EU and national policy-makers, social partners, training practitioners, training and research organisations, universities, students and citizens.

Orders may be made for publications in all official languages of the European Union and from publishers from all EU member states, but not only.

2.2 General purpose

The purpose of the contract is to achieve best value for Cedefop in the selection, acquisition, processing and delivery of books and serials, in accessing electronic resources for its library and electronic press clipping services for communication area.

2.3 Description of the lots

The tender is divided into the following 4 lots:

Lot 1: Acquisition and delivery of books and other printed monograph publications

Background

Currently, Cedefop purchases books in the field of vocational education and training (hereinafter VET) through a main supplier for books and with smaller local suppliers for specialized books, e.g. training books.

Purpose

The main purpose of the framework contract will be the purchase of books and other monograph publications through a single supplier. It will also include delivery, monitoring, bibliographic and newsletter services.

This lot includes four categories of books:

- scientific books in the field of VET,
- reference books,
- staff books,
- training books.

A detailed list of subjects covered is included in Annex I B – Subjects and topics.

Service Modalities

Language

All exchange of information concerning the execution of the contract between Cedefop and the contractor shall be in English.

Orders

For each intended order, Cedefop shall request the Contractor to provide a price quotation using the form provided in **Annex I C 1 c** or a similar form containing the same information. On the basis of the

information received, a specific agreement (order form), may be drawn up. The price of the order should be the same as the one that was specified in the quotation. It shall be signed by both parties.

A request for information concerning availability and price of a given item is not an order or a commitment to order. If the Contractor cannot supply the item or the price is considered to be unacceptably high, Cedefop may use another source for its delivery.

Ordering procedures must be rapid and efficient and according to the SLA.

Deliveries

Each order placed by Cedefop should be implemented within six (6) weeks, unless otherwise provided in the order form. Books shall be delivered by courier in such way as to respect the above six week period. Deliveries shall be made to the address mentioned in the order form drawn up by Cedefop (Thessaloniki, Greece).

Cedefop may refuse to accept and /or to pay for deliveries made beyond the date provided for in the order form. If not accepted, books will be returned to the Contractor at his charge. This will not affect Cedefop's right to impose penalties in case of breach of the Contractor's obligations as defined in the General Conditions of the contract.

In case of urgency, Cedefop may ask the contractor to provide an express order and delivery service. Such delivery will normally be expected to take place within ten (10) working days.

Publications delivered in hard copy must be packed in such a way that they are protected against damage, e.g. during handling.

Monitoring service

The contractor shall regularly monitor the progress of orders and report to Cedefop on a semester basis, using the monitoring form in **Annex I C 1 d**.

If he faces difficulties in delivering one or more of the ordered books, the contractor shall, within one month from the signature of the order form, take the appropriate steps to propose a solution (e.g. suitable substitute) as described in the SLA in view of meeting the deadline set.

If an express item is likely to miss its deadline, or is unavailable from the publisher/distributor, Cedefop must be notified within one working day of the Contractor being notified / made aware of the problem.

Bibliographic service

The contractor shall, using the form provided in Annex **I C 1 b** or a similar form containing the same information, provide a bibliographic service relevant to the field of VET.

The offer should include access to the Contractor's (or Publishers') databases, online catalogues, publishers' news, etc. An electronic bibliographic service (of any kind) would be preferred, both for selection but also for cataloguing the ordered items with data delivery direct to the Cedefop's Aleph system. Records are created in MARC 21 format and according to AACR2.

"Newsletter"

The contractor shall keep Cedefop informed about new books of relevance to the target public by means of a regular newsletter, news alert, mailing lists, etc. either in printed or electronic form.

Volume

For lot 1, the annual volume is estimated at 30 000 EUR.

The total value of the separate orders under the Framework contract for Lot 1 will depend on the titles and quantities to be ordered by Cedefop. It is not possible for Cedefop to commit itself to ordering a specified volume of supplies. The number of titles and copies that Cedefop may order may vary depending on the actual needs of Cedefop. For information and guidance to the tenderers that will

submit an offer for Lot 1 a non-exclusive short sample list of books recently ordered by Cedefop is attached as **Annex I C 1 a**.

After the Framework Contract for Lot 1 is signed the Contractor will be requested to submit quote for titles and /or publications not appearing in the sample list (attached as **Annex I C 1 a**).

Lot 2: Subscription and delivery of serials (journals and newspapers)

Background

Currently, Cedefop purchases serials in the field VET from one main provider. Around 160 serials (in paper and/or electronic format) are currently in annual subscription. A range of serials published in each EU Member State, in the national languages, is taken. Serials offering coverage of other countries and world regions outside the EU are also selected. More specialized serials are selected mainly in the English, French and German languages, in the wider VET field.

Purpose

The main purpose of the framework contract will be the purchase of serials including electronic subscriptions through a single supplier. There should be a combined offer of hard copy and online serials.

Service Modalities

Language

All exchange of information concerning the execution of the contract between Cedefop and the contractor shall be in English.

Orders

For each intended subscription or list of subscriptions, Cedefop shall request the Contractor to provide a price quotation using the form given in **Annex I C 2 c** or a similar form containing the same information. On the basis of the information received, a specific agreement (order form) may be drawn up. The price should be the same as the one that was specified in the quotation. It shall be signed by both parties. Ordering procedures must be rapid and efficient and according to the SLA.

Deliveries

For serials the Contractor should quote more types of supply:

- *news-stand serials (newspapers and magazines)*. Suppliers should offer delivery of news serials from 27 European Union member states in hard copy in a way that preserves their actuality, taking into account the periodicity of their publication (daily, weekly, monthly).
- *periodicals supply through direct delivery*. In this service type Cedefop places its subscription orders with the Contractor, and the Contractor then places the orders to ensure delivery at Cedefop. The actual delivery may be from the publisher or by the Contractor's own arrangements, but without consolidation. Cedefop will report missing issues and other problems to the Contractor, who has the responsibility to resolve them. All Cedefop financial transactions and correspondence will be with the Contractor, not with individual publishers.
- *consolidation service*. This service type operates in the same way as direct delivery, except that the titles are delivered via the Contractor who then ships a regular consignment of new issues to Cedefop. Most importantly, the Contractor shall keep checks of deliveries and should initiate claims for missing issues to the publisher, informing Cedefop of their result and of the measures taken to resolve the problem.

- *online serials*. Covers the online versions or part-versions (abstracts, Table of Contents (TOC)) of the serial titles which have been selected in paper, plus any exclusively online titles. This agreement is not intended to cover contracts with online news agencies, or with general database providers which have some online serials as a component element. For the online serials the Contractor should propose to and agree with Cedefop on pay-per-view arrangements for those serials that are not included in our subscriptions.

The Contractor should be able to offer back-issues of the serials that Cedefop subscribes to.

Deliveries shall be made to the address mentioned in the order form drawn up by Cedefop (Thessaloniki, Greece).

Deadlines for each delivery shall be as stated in each order form.

Cedefop may refuse to accept and /or to pay for deliveries made beyond the date provided for in the order form. If not accepted, periodicals will be returned to the Contractor at his charge. This will not affect the right of Cedefop to impose penalties in case of breach of the Contractor's obligations as defined in the General Conditions of the contract. The Contractor should offer refunds or compensation in the case of non-delivery of a publication in any format (the Contractor must, at his own initiative, credit the price of any copy he has been unable to deliver).

Monitoring service

The Contractor shall monitor the delivery of serials, e.g. quantities. The Contractor shall also inform Cedefop in the following cases: when a subscribed serial discontinues, when a subscribed serial changes its name, publisher, frequency, when a subscribed serial changes its form (from online to print or vice versa). The Contractor shall send this follow-up to Cedefop on a semester basis, using the form attached in **Annex I C 2 d** or a similar form containing the same information.

Bibliographic service

The Contractor shall, using the form provided in **Annex I C 2 b** or a similar form containing the same information, provide a bibliographic service relevant to the fields mentioned in the *Annex I B subjects and topics* or any other related subjects.

"Newsletter"

The Contractor shall keep Cedefop informed about new periodicals of relevance to the target public by means of a regular newsletter or some other form of news alert, either in printed or electronic form. This information should include bibliographic details, publication frequency, availability, formats.

Volume

For lot 2, the annual volume is estimated at 40 000 EUR.

The total value of the separate orders under the Framework contract for Lot 2 will depend on the titles and quantities to be ordered by Cedefop. It is not possible for Cedefop to commit itself to ordering a specified volume of supplies.

For the purpose of the Financial Evaluation of Lot 2 of this call for tenders, the calculation of costs and the comparison of the financial offers for this lot will be made based on the price offered by the tenderers for the supply/ies of serials given in the exhaustive sample list of periodicals attached as **Annex I C 2 a**.

The number of copies and the titles that Cedefop could order may vary depending on the needs of Cedefop. Cedefop may ask, after the contract for Lot 2 has been awarded, for a quote of a title not included in the attached exhaustive sample list of serials (journals and newspapers). The Contractor

should calculate the price for the new titles by applying to the publisher's price the same percentage margin as the Contractor applies for the other publications listed in **Annex 1 C 2 a**.

Lot 3: Subscriptions to electronic resources

Background

Currently, Cedefop purchases the following electronic resources through direct negotiation: Britannica, SourceOECD, DanteWeb, Dialog Classic, IMD World Competitiveness, Online dictionaries "Larousse" and "Harraps". All current electronic resources are annual subscriptions and slight annual variations in the selected online products are possible.

Purpose

The main purpose of Lot 3 of the framework contract will be the purchase of those electronic subscriptions (i.e. Britannica, SourceOECD, DanteWeb, Dialog Classic, IMD World Competitiveness, Online dictionaries "Larousse" and "Harraps") and some others upon request. Of future interest could be the databases in the **Annex I C 3 a** and any other database with a focus either on European Union or VET in its wider sense.

Service Modalities

Language

All exchange of information concerning the execution of the contract between Cedefop and the Contractor shall be in English.

Orders

For each intended subscription or list of subscriptions, Cedefop shall request the Contractor to provide a price quotation using the form given in **Annex I C 3 c** or a similar form containing the same information. A trial of the requested databases should be granted. On the basis of the information received, a specific agreement (order form) may be drawn up. The price should be the same as the one that was specified in the quotation. It shall be signed by both parties.

Deliveries

IP based access is needed but a remote access system (password access) will be an advantage. A management system of electronic resources for the internal users will be necessary for about 150 users (users are based in Thessaloniki and Brussels). This system should include access to management for accounts, resources, statistics and easy integration of new resources.

Volume

For lot 3, the annual volume is estimated at 20 000 EUR.

The total value of the separate orders under the Framework contract for Lot 3 will depend on the subscriptions to electronic resources to be ordered by Cedefop. It is not possible for Cedefop to commit itself to ordering a specified volume of subscriptions.

For the purpose of the Financial Evaluation of Lot 3 of this call for tenders, the calculation of costs and the comparison of the financial offers for this lot will be made based on the price offered by the tenderers for the annual subscriptions to electronic resources given in the exhaustive sample list attached as **Annex I C 3 a**.

The number of subscriptions to electronic resources that Cedefop could order may vary depending on the needs of Cedefop. Cedefop may ask, after the contract for Lot 3 has been awarded, for a quote for a subscription to electronic resource not included in the attached exhaustive sample list of electronic resources. The Contractor should calculate the price for the subscription to new electronic resource by applying to the publisher's price the same percentage margin as the Contractor applies for the other electronic resources in **Annex 1 C 3 a**.

Lot 4: Electronic press clipping services

Background

This service is needed to follow-up Cedefop's activities in the mass media.

Purpose

The main purpose of the framework contract will be the purchase of an electronic press clipping service in order to monitor Cedefop's media coverage and to follow up the press releases. A range of monitored sources is required, for example: newswires, newspapers, television and radio transcripts.

Service Modalities

Language

All exchange of information concerning the execution of the contract between Cedefop and the Contractor shall be in English.

Deliveries

The service should be delivered through an electronic database, with automatic notification and search options. IP based access is needed but in addition a remote access system (password access) will be an advantage. The service should cover media from all European countries. Full text articles are required in an electronic format (doc or pdf). We should be able to disseminate through our newsletter information found in the monitoring service relevant to Cedefop's work.

Volume

For lot 4, the annual volume is estimated at 17 000 EUR.

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 (for each lot)

Participation to this tender is only open to tenderers who are in a position to subscribe in full to the declaration on exclusion criteria and absence of conflict of interest in Annex C. Therefore all tenderers, all consortium members (if any) and all subcontractors (if any) shall provide the self-declaration found in Annex C duly signed and dated.

3.2 Selection criteria

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

Economic & Financial capacity (for each lot)

Requirement

- The tenderer must be in a stable financial position and have the economic and financial capacity to perform the contract. **The annual turnover of the tenderer for each of the last two years** for which the accounts have been closed must amount to at least:
 - 1) **For Lot 1 - EUR 70 000**
 - 2) **For Lot 2 - EUR 90 000**
 - 3) **For Lot 3 – EUR 50 000**
 - 4) **For Lot 4 – EUR 40 000**

Proof of economic and financial capacity may in particular be furnished by one or more of the following documents:

- balance sheets or extracts from balance sheets for at least the last two 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);
- a statement of overall turnover and turnover concerning services covered by the contract during the last two financial years.

One of these documents must show proof for the required minimum annual turnover for each lot (see above) **for each of the last two years.**

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

Technical and professional capacity (for each lot)

Tenderers should prove that they have sufficient technical and professional capacity to perform the contract as required below. To that end, they should fill in the attached questionnaire (**Annex I A**) and present documentation as to the following criteria:

- Organisational structure of the tenderer (company profile) and rate of coverage of the market of the call for tenders as evidenced by (international) client lists and relevant acknowledgement letters.
- coverage of minimum 50 (fifty) publishers (news sources – for lot 4) .

- Minimum three (3) years experience in the supply and in the provision of the respective services requested in the lot that the tenderer is applying for. (for **lot 1**- delivery of books and other printed monograph publications; for **lot 2** - subscription and delivery of serials; for **lot 3** – access to electronic resources; for **lot 4** - press clipping services).

- **The tenderers should have performed in the past three (3) years at least 3 contracts similar to the scope of each lot of this call for tenders**, for which the tenderer applies (for **lot 1**- delivery of books and other printed monograph publications; for **lot 2** - subscription and delivery of serials; for **lot 3** – access electronic resources; for **lot 4** - press clipping services). The tenderers should list those contracts indicating the subjects, a brief description of the project, the amounts, the dates, the name of the consignees etc.

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 groupings (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 (the Consortium leader) who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract. In case the Consortium is not registered as a legal entity, the Leader of the Consortium should be authorised by the other members with power of attorney that has to be attached to the 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/Subcontractors

Any subcontracting/subcontractor must be approved by Cedefop, either by accepting the bidder’s tender, or, if proposed by the Contractor after contract signature, in writing by an exchange of letters. The subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition. If awarded, the contract will be signed by the Tenderer, who will be vis-à-vis Cedefop, the only contracting party responsible for the performance of this contract.

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

In addition, each subcontractor must provide the required evidence for the exclusion criteria and the selection criteria “technical and professional capacity”. **Concerning the selection criteria ‘technical and professional capacity’, the evidence provided by the subcontractor(s) will be checked to ensure that the tenderer with the subcontractor(s) as a whole fulfil the criteria.**

Where no sub-contractor is given, the work will be assumed to be carried out directly by the bidder.

5 Award of the contract

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

A quality-price (for lot 1 – quality/ discount) ratio will be calculated for each tender by dividing the total points for quality by the price (for lot 1 – by the discount) points, thus indicating which tender represents the best value for money.

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

5.1 Technical evaluation

Technical evaluation

The technical evaluation below applies to all four lots and will be made by establishing an overall technical score for each tender, taking into account the individual scores for the following criteria:

- 1) Quality of the Service Level Agreement (60 points)
- 2) Coverage of needs (40 points)

Total technical score

The total technical score for each tender will be calculated as the sum of the individual scores for the evaluation criteria.

Thresholds

Individual scores will be attributed to the evaluation criteria according to the following scheme:

	%	Max. Points	Min. points to obtain
1) Quality of the SLA	60	60	30
2) Coverage of the needs	40	40	20
Total	100	100	65

In order to guarantee a minimum threshold of quality, offers that do not reach a minimum of 50% of the total possible score for each criterion of the technical evaluation will be eliminated from further evaluation. In addition, tenders that do not reach a minimum of 65% of the possible overall score for the technical evaluation will be eliminated from further evaluation.

5.2 Technical proposal

The assessment of the technical quality will be based on the ability of the tenderer to meet the requirements in the technical specifications. To this end, the tenderer must provide the following documents and/or information to allow evaluation of their tender according to the technical criteria mentioned above:

Quality of the Service Level Agreement (60%)

In order to evaluate the quality of the tenderer's order and delivery process and the additional services required, tenderers are invited to submit a Service Level Agreement (SLA) for each lot they tender for. The proposed SLA, which will later become an integral part of the framework contract, should include all the relevant details for the respective lot (general price and discount policy of the company, delivery/access, administrative procedures, relationship with providers, incident management, back-up procedures, etc)..

A draft SLA, that provides the basic structure for drawing it up, is attached as **Annex II**. For reasons of comparability of tenders, the use of this form is mandatory.

Coverage of needs (40%)

The tenders will be evaluated as to what extent they cover the needs of Cedefop.

Elements of consideration will be:

- Target specific catalogue: Based on the catalogue subjects listed in point 1 of **Annex I B**, tenderers are expected to offer a catalogue of publications/databases that are relevant given the various needs and the different levels of expertise within Cedefop (see 2.3 above). In addition, tenderers shall also indicate:
 - a) **for lots 1 and 2**
 - The approximate number of titles available on their catalogue.
 - Monitoring services: tenderers are invited to give an example of the monitoring that they are carrying out, using the monitoring forms attached in **Annex I C 1 d and I C 2 d**.
 - Bibliographic service: tenderers are invited to establish a list of proposals as to the bibliography topics listed under point 1 of **Annex I B**, thus showing their expertise and their knowledge in the educational publications market.
 - Newsletter: Tenderers are invited to provide their intentions as to the content and scope of a regular newsletter, specifically aiming at providing Cedefop with information on new publications in the relevant areas of interest.
 - b) **for lot 3** - the number of the resources that they could deliver.
 - c) **for lot 4** - the number of sources covered by the monitoring service.

5.3 Financial evaluation

Upon completion of the technical evaluation, only the financial offers of the tenders who were not eliminated during the technical evaluation (i.e., those which have achieved an average overall technical score of 65 points or more, and 50% or more for each of the two criteria) will be evaluated.

For Lot 1

The tenderer with the highest financial offer (i.e lowest discount) will receive a price indicator of 100 points. The other tenderers will receive lower points proportional with the highest offer.

For Lot 2, Lot 3 and Lot 4

The tenderer with the highest financial offer will receive a price indicator of 100 points. The other tenderers will receive lower points proportional with the highest offer.

5.4 Financial proposal

For Lot 1

- **The tenderer should make a discount offer for supply, following Annex III A – Financial proposal Lot 1** by submitting a **single flat discount rate** which is the maximum rate applicable to all the print books and resources from all the publishers without any conditions. Separate discount rates for different titles and publishers are not allowed. The offered percentage of flat discount rate, applied to the publishers' list price, must be final and must cover all service costs and all charges for handling, insurance, taxes, duties, clearance, transport and delivery to Cedefop. The rate of discount so quoted must be valid (fixed and not revisable) for all the orders placed for a period of 1 year.

- for example, an offer at "100%" means that Cedefop shall simply pay the price in the publisher's catalogue or as printed on the book or magazine. An offer of "95%" means the CEDEFOP shall receive a 5% discount on the list price for all items. In all cases this percentage rate is for an "all inclusive price" - no extra charges for handling, delivery etc. will be accepted.

***For illustration:** taking into account tenderer's own costs of purchase, other costs including estimated delivery costs, and any discounts, the tenderer may conclude that an economic rate to charge Cedefop is 98% of publisher's list price. This means that for an item with the cover price of EUR 20, the tenderer would charge Cedefop EUR 19.60, for delivery to Cedefop.*

- The tenderers applying for Lot 1 are also asked to make a financial offer for the items in **Annex I C 1 a** - list of books. The tenderers are requested to fill in the price for each title, with all charges and discounts included. **NB This will not be subject of Financial Evaluation, but will be for information only.**

Please note that the cost of associated services (processing, cataloguing, delivery, monitoring, bibliographic and newsletter services) should be included in the offered flat discount rate for the supply. Packing, forwarding and freight charges will not be payable extra.

The reason for this approach is that it facilitates fair comparison between offers, and simplifies the implementation of the contract.

For Lots 2 and 3

The prices shall be for items in the lists provided in the annexes:

- **Annex I C 2 a** - list of periodicals,
- **Annex I C 3 a** - list of e-sources.

These annexes shall constitute part of the financial proposal for the respective lot. The tenderers should fill in the price offered for each title, with all charges and discounts included.

For Lot 4

The tenderers should make a price offer for the press clipping service provided by filling in the **Annex III B Financial Proposal Lot 4**.

Information concerning price

- The discount rate (for Lot 1) and the offered prices (for Lots 2, 3 and 4) quoted must be fixed and not revisable for the first year of the contract.
- For each following year, the contractor/s could provide an updated discount rate (for Lot 1) and list of prices (for Lots 2, 3 and 4) based on the requested list of titles/services.
- The prices for Lots 2, 3 and 4 must be quoted in euro and include all expenses.
- Under Articles 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). Such charges may not therefore be included in the calculation of the price quoted. The VAT amount must be indicated separately.

6 Information on presentation and content of tender

It is extremely 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 fully respect the instructions indicated under points 2 and 3 of this open invitation to tender.

In addition, below you will find details of the required documentation.

6.1 Envelope A - Supporting documents

One original and one copy of:

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

6.2 Envelope B – Technical proposal

One original signed unbound version and four bound copies of:

- the technical proposal providing all information requested in point 5.2 including information relevant to subcontracting as requested in point 4.2.

6.3 Envelope C – Financial proposal

One original signed unbound version and four bound copies of:

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

ANNEX A

CONTRACT NOTICE

ANNEX B

DRAFT CONTRACT

ANNEX C

Declaration of honour with respect to the Exclusion Criteria and absence of conflict of interest

The undersigned.....[name of the signatory of this form, to be completed]:

- in his/her own name..... (if the economic operator is a natural person or in case of own declaration of a director or person with powers of representation, decision making or control over the economic operator)
or
- representing..... (if the economic operator is a legal person)

official name in full (only for legal person):.....

official legal form (only for legal person):.....

official address in full:

VAT registration number:

declares that the company or organisation that he/she represents / he/she:

a) is not bankrupt or being wound up, is not having its affairs administered by the courts, has not entered into an arrangement with creditors, has not suspended business activities, is not the subject of proceedings concerning those matters, and is not in any analogous situation arising from a similar procedure provided for in national legislation or regulations;

b) has not been convicted of an offence concerning professional conduct by a definitive court judgement;

c) has not been guilty of grave professional misconduct proven by any means which the contracting authorities can justify;

d) has fulfilled all its obligations relating to the payment of social security contributions and the payment of taxes in accordance with the legal provisions of the country in which it is established, with those of the country of the contracting authority and those of the country where the contract is to be carried out;

e) has not been the subject of a definitive court judgement for fraud, corruption, involvement in a criminal organisation, money laundering or any other illegal activity detrimental to the Communities' financial interests;

f) is not the subject of administrative penalty for being guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the procurement procedure or failing to supply an information, or being declared to be in serious breach of its obligation under contract covered by the budget.

In addition, the undersigned declares on their honour that:

g) they have no conflict of interest in connection with the contract; a conflict of interest could arise in particular as a result of economic interests, political or national affinities, family or emotional ties or any other relevant connection or shared interest;

h) they will inform the contracting authority, without delay, of any situation considered a conflict of interest or which could give rise to a conflict of interest;

i) they have not made and will not make any offer of any type whatsoever from which an advantage can be derived under the contract;

j) they have not granted and will not grant, have not sought and will not seek, have not attempted and will not attempt to obtain, and have not accepted and will not accept any advantage, financial or in kind, to or from any party whatsoever, constituting an illegal practice or involving corruption, either directly or indirectly, as an incentive or reward relating to award of the contract;

k) that the information provided to Cedefop within the context of this invitation to tender is accurate, sincere and complete;

l) that in case of award of contract of a value greater than 133,000 Euro, they shall provide the evidence that they are not in any of the situations described in points a), b), d) and e) above. Specifically:

For situations described in (a), (b) and (e), production of a recent extract from the judicial record is required 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. Where the Tenderer is a legal person and the national legislation of the country in which the Tenderer is established does not allow the provision of such documents for legal persons, the documents should be provided for natural persons, such as the company directors or any person with powers of representation, decision making or control in relation to the Tenderer.

For the situation described in point (d) above, recent certificates or letters issued by the competent authorities of the State concerned are required. These documents must provide evidence covering all taxes and social security contributions for which the Tenderer is liable, including for example, VAT, income tax (natural persons only), company tax (legal persons only) and social security contributions.

For any of the situations (a), (b), (d) or (e), where any document described in the two paragraphs above 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.

By signing this form, the undersigned acknowledges that they have been acquainted with the administrative and financial penalties described under Article 134b in conjunction with Article 133a of the Commission Regulation (EC, Euratom) No 2342/2002 of 23/12/2002 laying down detailed rules for the implementation of Council Regulation (EC, Euratom) No 1605/2002 on the Financial Regulation applicable to the general budget of the European Communities, which may be applied by analogy by Cedefop if any of the declarations or information provided prove to be false.

Full name

Date

Signature

ANNEX D

LEGAL ENTITY FORM

(to be downloaded, depending on the nationality and legal status 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

PLEASE NOTE:

Please indicate the BIC (Bank Identification Code) in the REMARKS box of the downloaded form.

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 documents to be included as part of the tender</u>	<u>Reference paragraph</u>	<u>Included</u>		<u>If the document is not included, please provide an explanation for the reason</u>
<u>Envelope ‘A’ must contain</u> one original and one copy of:		Yes	No	
- this checklist		☐	☐	
- exclusion criteria declaration (If applicable, including those of consortia and subcontractors)	3.1, 4.1 & 4.2	☐	☐	
- selection criteria documents (If applicable, including those of consortia and subcontractors)	3.2, 4.1 & 4.2	☐	☐	
- 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	☐	☐	
<u>Envelope ‘C’ must contain</u> one original and four copies of:				
- the financial proposal	5.4	☐	☐	

You should also ensure that:

☐	your offer is formulated in one of the official languages of the European Union.
☐	both the technical and financial proposals of the offer are signed by you or your duly authorised agent.
☐	your offer is perfectly legible in order to rule out any ambiguity.
☐	your offer is submitted in accordance with the envelope system as detailed in the invitation to tender point 3.
☐	the outer envelope bears the information mentioned in the invitation to tender point 3.

TECHNICAL ANNEXES:

Annex I A - Selection of the tenderer Lot 1
Annex I A - Selection of the tenderer Lot 2
Annex I A - Selection of the tenderer Lot 3
Annex I A - Selection of the tenderer Lot 4
Annex I B - Subjects and topics
Annex I C 1 a - Financial Proposal Sample List of books -Lot 1
Annex I C 1 b - Bibliography
Annex I C 1 c - Quotation
Annex I C 1 d - Monitoring
Annex I C 2 a - Financial Proposal List of Serials - Lot 2
Annex I C 2 b - Bibliography
Annex I C 2 c - Quotation
Annex I C 2 d - Monitoring
Annex I C 3 a - Financial Proposal List of Electronic Resources -Lot 3
Annex I C 3 c - Quotation
Annex II - Service Level Agreement SLA
Annex III A - Financial Proposal Lot 1
Annex III B - Financial Proposal Lot 4