

FINANCE AND PROCUREMENT

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Thessaloniki, 16 May 2017

OPEN INVITATION TO TENDER

Annual subscriptions to electronic resources AO/DCM/MWI-COROM/electronic resources/001/17

REFERENCE: *Contract notice - 2017/S 092-181208 of 13/05/2017*

Tender Specifications

Dear Sir/Madam,

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

The purpose of this call for tenders and additional information necessary to present a tender can be found in the attached Tender Specifications. You should note however the following important points concerning the submission of a tender and its implications.

1. Tenders (and documents included in them) should be submitted preferably in English, but in any case in one (or in any) 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 the date and time specified in the timetable in point 8 below**, in which case the evidence shall be constituted by the date of dispatch on the postmark or the date of the deposit slip, to the following post address of Cedefop :

**European Centre for the Development of Vocational Training (Cedefop),
Attention of Procurement Service
PO Box 22 427
GR – 55102 Thessaloniki, Greece**

Important:

If using a postal service, tenderers must use a registered, reliable one. If no postmark has been stamped or if the postmark is not legible, Cedefop will accept deposit slip issued by the postal service, provided that this clearly indicates the date as filled in by the post office and not by the tenderer.

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.

Tenderers should not attach their offer to any of the above informative e-mail or fax.

or

(b1) by courier service to be dispatched not later than **the date and time specified in the timetable in point 8 below**, in which case the evidence shall be constituted by the date of dispatch to the address below or the date of the deposit slip,

or

(b2) delivered by hand not later than **the date and time specified in the timetable in point 8 below**, 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 (for points **(b1)** and **(b2)** above):

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

Please note that Cedefop is open from 09h00 to 17h00, 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 submitted 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.

Tenderers must pay attention to the **quality of the packaging material**, especially of the inner envelope, in order to make sure that it will remain sealed until the formal opening of tenders by the Agency.

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 <i>CEDEFOP No: AO/DCM/MWI-COROM/electronic resources/001/17</i> <i>‘Annual subscriptions to electronic resources’</i> Name of tenderer: NOT TO BE OPENED BY THE INTERNAL MAIL SERVICE

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 section 6 of the attached Tender Specifications.

Tenderers should not disclose their financial offer in any part of their tender other than the sealed envelope C, not even disclose the total amount of their financial offer on the cover letter.

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. Therefore, It is mandatory to include in the offer a **Cover Letter, signed by the person/s that is/are authorised to sign the contract in case of contract award, stating that the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure** (see also point 1 of the Tender Specifications).
6. The opening of tenders will take place at Cedefop on the date and time specified in the timetable in point 8 below. Each tenderer may be represented at the opening of tenders by maximum two representatives. The names of the persons 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 three working days prior to the opening session. Failing that, Cedefop reserves the right to refuse access to its premises.
7. Contacts between the contracting authority (Cedefop) and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

7.1 Contacts 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 tender documents. Any request for additional information must be made in writing by e-mail (C4T-services@cedefop.europa.eu) or by fax (fax No +30 2310 490 028).

Requests for additional information/clarification (if any) from potential tenderers should preferably be written in English and should be received by the date and time as specified in the timetable in point 8 below. No such requests will be processed after that date.

Before requesting any additional information, the tenderers are kindly requested to visit the FAQ page on Cedefop website:

<http://www.cedefop.europa.eu/en/about-cedefop/faqs/procurement-procedures>.

- Cedefop 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 tenders.

The Answers/Clarifications of Cedefop to the requests for additional information/clarification of the tenderers, including that referred to above, will be published on Cedefop's website under the same link where this Open Tender

Procedure is announced (<http://www.cedefop.europa.eu/en/about-cedefop/public-procurement>.) **Tenderers must ensure that they visit regularly the site for updates up to the closing date for receipt of tenders.**

7.2 Contacts after the final date for submission of tenders and before opening:

- Tenderers should not contact the Contracting Authority (i.e. Cedefop) on their own initiative.
- Tenderers are not allowed to amend their offers, e.g. by completing the documents they sent, replacing them with amended ones or sending new documents initially not included in the tender, as this may lead to rejection of the tender at a later stage. Any such need for additional information/document identified by the Evaluation Committee during the evaluation process will be notified to the tenderer concerned at Cedefop's initiative, providing for a reasonable deadline for response (see also the provisions under the heading below).

7.3 Contacts after the opening of tenders:

- Tenderers should not contact Cedefop on their own initiative at that stage.
- If clarification on the compliance with the Eligibility and/or Selection Criteria is required or if obvious clerical errors in the tender need to be corrected Cedefop may contact tenderer/s in writing to obtain further clarification or documents on specific points of the tender or to correct obvious clerical errors.
- If the necessary information and/or supporting documents for the assessment of an award criterion are missing, these may not be requested as clarification if this might alter the proposal. Any requests for clarification in that regard should not lead to amendment of the terms of the tender. Tenderers must not modify their tender or add any new elements to it. The reply must therefore make clear reference to the relevant information already present in the file. This will serve solely the purpose to provide the Evaluation Committee with a clarification regarding the technical proposal provided the terms of the tender are not modified as a result.
- In regards to possible clarifications on obvious clerical errors in the Financial Offer, tenderers must not add any new prices, but only explain the quotation on the basis of elements and prices already present in the offer. In case a tenderer alters his financial offer during a clarification (beyond the correction of any obvious clerical/calculation errors), this offer will be automatically rejected.
- Tenderers should be prepared to reply to such requests for clarification within a short reasonable deadline as it will be stated in the request for clarification.

8. Timetable:

	DATE	TIME
Deadline for request for any clarifications from the Contracting Authority (Cedefop)	07/06/2017	N/A
Last date on which clarifications are issued by Cedefop	09/06/2017	N/A
Deadline for submission of tenders (hand	16/06/2017	17.00h

delivered)		
Deadline for submission of tenders by post / courier	16/06/2017	N/A
Validity of the tenders	16/12/2017	N/A
Tender opening session	29/06/2017	11.00h
Estimated contract signature date	End of August 2017	

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

In exceptional cases, before the period of validity expires, Cedefop may ask the tenderers to extend the period for a specific number of days, which may not exceed 40.

The selected tenderer must maintain his tender for a further period of 60 days from the date of notification that his tender has been recommended for the award of the contract. The further period of 60 days is added to the initial period of 6 months irrespective of the date of notification.

10. All costs incurred for the preparation and submission of tenders are to be borne by the tenderers and will not be reimbursed.
11. Up to the point of signature, the contracting authority (i.e. Cedefop) may either abandon the procurement or cancel the award procedure, without the candidates or tenderers being entitled to claim any compensation. If such decision is taken, the tenderers will be notified accordingly.
12. This invitation to tender is in no way binding on Cedefop. Cedefop's contractual obligation commences only upon the signature of an Order Form under the Framework Contract, whereby signature of the Framework Contract alone does not commit Cedefop to order.
13. Evaluating your tender and your possible subsequent replies to questions in accordance with the specifications of the invitation to tender, will involve the recording and processing of personal data (such as your name, address and CV). Unless indicated otherwise, such personal data will be processed by Cedefop's Finance and Procurement Service solely for that purpose and pursuant to Regulation (EC) No 45/2001 on the protection of individuals with regard to the processing of data by the Union institutions and bodies and on the free movement of such data. Details concerning the processing of your personal data are available on the privacy statement at:
http://ec.europa.eu/dataprotectionofficer/privacystatement_publicprocurement_en.pdf.
- 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.
14. Your personal data may be registered in the Early Detection and Exclusion System (EDES) if you are in one of the situations mentioned in Article 106 of the Financial Regulation¹. For more information, see the Privacy Statement on
http://ec.europa.eu/budget/explained/management/protecting/protect_en.cfm#BDCE).

¹ Regulation (EU, Euratom) No 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1605/2002 (OJ L 298 of 26.10.2012, p. 1) as amended.

15. Once Cedefop has opened the tender, it becomes its property and it shall be treated confidentially.
16. You will be informed of the outcome of this procurement procedure by e-mail only. It is your responsibility to provide a valid e-mail address together with your contact details in your tender and to check this e-mail address regularly.

Yours sincerely,

Michail Christidis
Head of Finance and Procurement

Attached: Tender Specifications

OPEN INVITATION TO TENDER

AO/DCM/MWI-COROM/electronic resources/001/17

‘Annual subscriptions to electronic resources’

Tender Specifications

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Introduction to Cedefop: Europe's agency for training policy

Source: <http://www.cedefop.europa.eu/EN/about-cedefop.aspx>

About Cedefop

Cedefop is the European Union's agency for vocational education and training (VET). With its research and analyses, it supports the European Commission, EU Member States and social partners in designing and implementing VET policies, with a focus on how best to link education and employment.

European labour markets have been unsettled by globalisation, technological advances and demographic changes (ageing of the population and immigration). The economic downturn of the last decade has increased social inequality and geographical disparity. To address the economic, social, technological and environmental challenges, structural reforms both of labour markets and education and training systems are needed.

In this context, vocational education and training can help get people (back) into work and promote equality, inclusion and solidarity. VET is a pillar of lifelong learning, providing young people with an initial qualification and adults with upskilling options. VET caters both for the brightest, offering them interesting career prospects, and the most vulnerable, opening different pathways into the labour market.

Cedefop's work can be divided into three main strands:

Shaping VET

VET systems and institutions must be relevant to individual and labour market needs. Cedefop fosters their renewal and modernisation in response to emerging policy needs and priorities. It monitors labour market changes and policy implementation in the EU Member States and reports on these.

VET systems need to take into account learning acquired in different ways and at different times and allow people to move between countries and sectors. Cedefop promotes the use of European tools such as qualifications frameworks which allow Europeans working or learning abroad to "take their qualifications with them" by facilitating understanding and recognition of these.

Valuing VET

The ultimate goal of VET policy is to meet the needs of individuals: to strengthen their employability, help them find and keep jobs and allow them to make a good living. At individual countries' request, Cedefop reviews their VET policies and programmes to support effective implementation of European policies (e.g. work-based learning and apprenticeships) and policy learning between countries.

With its work on guidance and the validation of non-formal and informal learning, Cedefop promotes access to VET. It supports the inclusive role of VET by facilitating the (re)integration into education and training of low-skilled and other vulnerable groups.

Informing VET

Cedefop looks into how socio-economic and demographic trends affect employment, nature of jobs and demand for skills in the labour market. It forecasts future skills needs and supply to help individuals, employers and policy makers to make informed decisions about education, training and careers. It identifies policies and practices to help policy makers and VET providers address skills mismatches.

Cedefop supports countries to develop their own intelligence and data on skills and employment needs.

Cedefop's information

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. All Cedefop publications are available for download. Cedefop hosts and organises conferences and events throughout the year.

In addition to its web portal www.cedefop.europa.eu, Cedefop's work can be followed on Facebook at www.facebook.com/cedefop and Twitter at www.twitter.com/cedefop.

1. OVERVIEW OF THIS TENDER PROCEDURE

In submitting its tender in response to this tender procedure, the tenderer accepts in full and without restriction the requirements of these Tender Specifications, and the Special and General conditions governing this contract as the sole basis of this tendering procedure, whatever his own conditions of sale and terms of business may be, which he hereby waives. No account can be taken of any reservation or disclaimer expressed in the tender as regards the tender dossier's Tender Conditions and Specifications and the Contract's Special and General Conditions. If necessary, clarification may be requested by the potential tenderer concerned while the tender submission phase is open – see point 7 of the Invitation to tender. Any reservation or disclaimer may result in the rejection of the tender without further evaluation on the grounds that it does not comply with the conditions of the Tender Dossier.

Tenderers are expected to examine carefully and comply with all instructions, forms, contract provisions and specifications contained in this tender dossier. Failure to submit a Technical and a Financial Proposal containing all the required information and documentation may lead to the rejection of the tender.

1.1. Description and type of the contract

- *Title of the contract:* 'Annual subscriptions to electronic resources'
- *Short description of this contract:*

The main purpose of the framework contract is the purchase of annual subscriptions to electronic resources through a single supplier. The services required include also a discovery service (Summon Discovery) to support a simultaneous search through all or most of these electronic resources and a single log-in solution (OpenAthens) for all the electronic resources enabling the access to the resources while at home or travelling.

The services aim at retrieving information for the use of scientific research, monitoring developments in the policy field at EU and national level in EU countries and citations of Cedefop publications. Access should be granted to the main office in Thessaloniki (Greece), to our office in Brussels and also remotely, for home access or travelling staff.

- *Type of contract:* Framework Service Contract whereby the services will be provided following the signature of Order forms throughout its validity. The number and content of Order Forms will depend on the needs of Cedefop.

1.2. Place of delivery or performance

The tasks must be completed outside Cedefop in the Contractor's premises.

1.3. Division into lots

This tender procedure is not divided into lots.

1.4. Variants

Tenderers **may not** offer variant solutions to what is requested in the tender specifications. Cedefop will disregard any variants described in a tender, and reserves the right to reject such

tenders without further evaluation on the grounds that they do not comply with the tender specifications.

1.5. Value or quantity of purchase

The maximum budget for the required services described in this call for tenders amounts at **200,000 EUR (without VAT)** over a **4** years period. Tenderers should be aware that the information on volume shall not be binding on Cedefop and should not be considered as a warranty as to the final value of the contract. The sum of the amounts of the successive Order Forms that will be issued after the Framework Contract is signed may not reach the above mentioned value for the Framework Contract. Cedefop will be contractually bound only by the amounts effectively entered in the successive signed Order Forms. The total value of the framework contract will ultimately depend on the orders which Cedefop may place through Orders Forms.

1.6. Duration of the contract

The contract shall enter into force on the date of signature of the last contracting party, shall have initial duration of one (1) year and will be automatically renewed up to three (3) times, each for an additional period of one (1) year, covering a total acquisition period of four (4) years (1+1+1+1).

1.7. Main terms of financing and payment

Payments will be made upon completion of specific tasks and after the approval by Cedefop Project Manager, within 30 days of submission of invoices and at the conditions set out in the draft contract.

2. TERMS OF REFERENCE

1. Introduction

- Cedefop is looking to subscribe to electronic resources including mainly databases and various related services (e.g. a discovery service and a single log-in service). While the languages covered should include all EU languages, most of the information covered by the electronic resources will be in the English language. The content of the databases will have a special focus on social sciences but can cover also more general themes. The databases will include scientific publications, abstract and citations databases, e-books, journal articles, electronic newspapers, etc.
- The target group of these services are the staff members of Cedefop. The potential user group is comprised of approximately 120 staff members and researchers occasionally visiting Cedefop's headquarter in Thessaloniki.

2. Purpose

- The main purpose of the framework contract is the purchase of annual subscriptions to electronic resources through a single supplier. The contract includes also a discovery service to support a simultaneous search through all or most of these resources and a single log-in service to allow the remote access from home or while travelling.
- The services aim at retrieving information for the use of scientific research, monitoring developments in the policy field at EU and national level in EU countries and citations of Cedefop publications. Access should be granted to the main office in Thessaloniki (Greece), to our office in Brussels and also remotely, for home access or travelling staff.

3. Current subscriptions

- Currently, Cedefop is subscribing to electronic resources through a single supplier.
- The current subscriptions are: OECD iLibrary (a sub-set of databases), Emerald, Scopus, Encyclopaedia Britannica, ebrary, Library PressReader, IMD World Competitiveness Online, Summon Discovery, 360 Link resolver and OpenAthens.

4. Communication and customer relation

Customer care

- All exchange of information, written or oral, concerning the execution of the contract between Cedefop and the Contractor shall be made in the English language. If an administration interface is available, then the interface should be available in the English language.
- A customer account manager responsible for the overall management of the contract and for the communication with Cedefop must be appointed. This person will maintain regular communication with Cedefop, mainly via email or phone. A back-up of this person should be assigned.
- Customer service should be provided, at least four (4) hours during Cedefop working hours (9 AM to 5 PM UTC+02:00 time zone), Monday to Friday, except Cedefop's public holidays and Contractor's public holidays.

- Customer services should be provided for any issue related to a good implementation of the contract and should include communication with publishers, incident management, invoicing, follow up on agreements with publishers and follow-up of orders, etc.

Incident management

- Incident management regarding unavailability of service, changes in the IP numbers, other possible access issues, should be dealt by the Contractor in an efficient way.
The Contractor should monitor and inform Cedefop on any changes occurred regarding a service offered by the publishers. Also, the Contractor should keep track and inform Cedefop well in advance on the deadline for renewal or cancellation of subscriptions, in a way to avoid any service interruptions or any penalties due to late cancelations.

Training

- The Contractor should provide or intermediate with the publisher an initial training regarding the use of the resources, without charging any additional cost. The Contractor may propose a remote training. The trainings should include the administrator modules, if available, and the user modules. Trainings should be provided on request during the first month after the service start.

6. Ordering procedures

Orders timing

- For information and guidance to the tenderers, the list of resources currently subscribed or desired by Cedefop is attached as Annex K - sample list of resources. After the Framework Contract is signed, the Contractor will be requested to submit quotes for resources appearing in the non-exhaustive (indicative, non-committing) sample list.
- Each year, Cedefop will send the request for quotation with a list of subscriptions (quotation form) to be ordered for the current or the following year. The first order will be placed after the signature of the contract for the annual subscriptions of 2017. Also, subscriptions can be placed around the year, if the need arise or if a subscription is due to expire at another date.

Order's procedure

- Cedefop will place orders by email, using orders forms including the following information:
To be completed by Cedefop:
 - Title (packages of databases might be requested: e.g. educational package);
 - Publisher;
 - Type of access required;*To be completed by the Contractor:*
 - Price per subscription – this price should be firm and should respect the pricing formula in the financial offer; prices on the invoices should be the same; no extra charge will be accepted;
 - Type of access offered – Cedefop prefers IP access and the remote access through OpenAthens;
 - Start and end dates.
- The ordering process shall be as follows (all the correspondence concerning orders shall be done through email):

- Cedefop sends to the Contractor a request for quotation;
- The Contractor provides prices together with the publisher's pricelist within seven (7) working days from the request;
- If the offer is accepted, Cedefop sends to the Contractor an order form, validating the quotation;
- the contractor send back the signed order form within 7 days, which will be signed by Cedefop as the last contracting party.
- No automatic renewal should be done without a specific request from Cedefop.
- No orders will be placed by phone.
- To ensure that the financial offer is respected Cedefop may request proof of the publisher's prices (publisher's pricelist) before validating orders.
- A request for information concerning availability and price of a new resource is not an order or a commitment to order. If the Contractor cannot supply the resource or if the price is considered to be unacceptably high compared to the publisher's pricelist, Cedefop may use another source for ordering the service.

Trials

- Cedefop might place orders for access to new electronic resources and, in this case, a trial might be required in order to evaluate the usefulness of the resource. A request for trial is not an order or a commitment to order.

7. Access delivery

Contact with the publishers

- The Contractor should arrange with the publishers all the necessary steps to grant Cedefop access to the services (e.g. handle license agreements, receive and pay the invoices, provide to the publishers the IP ranges of Cedefop, monitor the opening of service, etc). The need of contact between Cedefop and the publishers should be limited to minimum.

Access method

- The resources should be accessible through IP recognition inside Cedefop's premises (for around 120 potential users) and in our Brussels' office (for around 3 users).
- Cedefop shall acquire from the Contractor the single log-in service OpenAthens to provide remote access for the staff members from outside of the premises of Cedefop. The Contractor should supervise the one-off implementation of this service.

Discovery service

- Provision of Summon discovery service to offer simultaneous search through all or the majority of the resources is essential. Summon is already a serviced used by Cedefop, so no implementation support shall be needed.

8. Transfer of subscriptions from the previous Contractor and to the next Contractor

Transfer from the previous Contractor

- The Contractor should assist Cedefop in the transfer of the subscriptions from the previous Contractor. The Contractor should make clear to the publishers that the orders are transferred from another agent and are not new subscriptions.

Transfer to the next Contractor

- The Contractor should also assist Cedefop in transferring subscriptions to another company at the end of the contract or if the contract is terminated early due to poor performance or liquidation of the company.

3. SPECIFIC INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation to this tender procedure is only open to tenderers who are in a position to subscribe in full to the “**Declaration on honour on exclusion criteria and selection criteria**”, given in Annex C. All tenderers, all group (consortium) members (if any) and any subcontractor/s (identified as per the two bullet-points in the fourth paragraph of point 4.2 below) MUST provide the declaration on honour found in Annex C duly signed and dated.

3.1. Exclusion Criteria

The purpose of the exclusion criteria is to determine whether an economic operator / tenderer is allowed to participate in the procurement procedure or to be awarded the contract.

The exclusion criteria will be assessed in relation to each company individually. In the event of recommendation for contract award, evidence will be requested as described in Annex C (last page).

3.2. Selection criteria

The selection criteria concern the tenderer's capacity to execute similar contracts.

The tenderers must submit documentary evidence (or statements, where required) of their economic, financial, technical and professional capacity to perform this contract.

Each and all requirements for economic and financial capacity should be fulfilled by the tenderer - alone (in the case of single tenderers) or as a whole (in case the tenderer is a grouping/consortium). Participation in tendering is open to all legal persons bidding either individually or in a grouping (consortium) of tenderers.

An economic operator may, where appropriate and for a particular contract, rely on the capacities of other entities, regardless of the legal nature of the links which he has with them. It must in that case prove to the contracting authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place their resources at his disposal. This obligation may be fulfilled by presenting signed statements from those entities. Please note that natural persons (individuals, freelancers) are also considered 'entities' for this purpose.

3.2.1. Economic and Financial capacity

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

Requirement:

- The average annual turnover of the tenderer for the last **three** financial years concerning the type of services covered in this call for tenders should be at least **50,000 €**.

Proof of economic and financial capacity **must** be furnished by the following document:

- Signed Statement (Please fill-in and sign your Statement in **Questionnaire 2** of Annex G) of the tenderer's turnover for the last **three** financial years concerning the type of services similar in nature to those making the subject of this call for tenders.

In case of a consortium (grouping) or subcontracting each member of the consortium and all subcontractors (in line with points 4.1 or 4.2 below) must provide the required statement for the economic and financial capacity, **but the assessment of whether the minimum requirement is met will bear on the consortium as a whole or the tenderer together with his subcontractors.**

In the event of recommendation for contract award the winning tenderer (single tenderer or in the case of a consortium (grouping) each member of the consortium) will be requested to prove the above by submitting Audited Financial Statements (Audited Profit and Loss Account/ Statement or equivalent) if these are foreseen by the respective national legislation. Should total subcontracting exceed 40% of the work by value, Cedefop reserves the right to request audited financial statements also from the subcontractors.

If, for some exceptional reason the winning tenderer (or any consortium member or subcontractor) is unable to provide one or other of the above documents, they will be required to justify the non-provision and may prove their economic and financial capacity by any other document which Cedefop considers appropriate. Cedefop reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

3.2.2. Technical and professional capacity

The Tenderers are required to have sufficient technical and professional capacity to perform the contract.

Requirements for Technical and professional capacity:

- Be enrolled in the relevant professional register;
- Have adequate structure and resources to perform the services described in the Terms of Reference;
- Have provided services in the past **3 (three)** years in execution of at least **3** contracts similar to the scope and nature as those required in this call for tenders, with a combined total value of **100.000 €** at minimum;

Proofs / Evidences of Technical and professional capacity

The following documents or information must be presented by the tenderer to prove his technical and professional capacity to perform the proposed contract:

- Document for enrolment in the relevant professional register, as prescribed by the laws of the Member State, where the tenderer is established (**please fill-in Questionnaire 5 of Annex G**);
- Brief company profile to prove the ability, technical know-how, experience and expertise in terms of structure and resources needed for the provision of the required services under this call for tenders (**please fill-in Questionnaire 4 of Annex G**);
- List of at least 3 contracts with services provided by the deadline for submission of offers and within the past **three** years, that are similar to the scope and nature as those required in this call for tenders and with total amount of min. **100,000 EUR**, describing the contracting authorities, the subjects, the amounts, the dates, the percentage and the specific tasks performed by the tenderer (**please fill-in Questionnaire 3 of Annex G**);

In case of consortium or subcontracting, the consortium or the tenderer with all subcontractors together have to provide evidence of technical and professional capacity as a whole (please see also 4.1 and/or 4.2 below).

3.3. Legal Position

Tenderers may choose between submitting a joint offer (see 4.1) as a Consortium / Grouping or introducing a bid as a single tenderer, in both cases with the possibility of having one or several subcontractors (see 4.2). Whichever type of bid is chosen, the tender must stipulate the legal status and role of each legal entity in the tender proposed (see also 5th bullet of point 4.1. below). To identify himself (and any other participating entities, if applicable), the tenderer must complete **Questionnaire 1 in Annex G**. In the same Questionnaire each tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with Commission Recommendation 2003/361/EC which can be found in the following link: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2003:124:0036:0041:en:PDF>.

Tenderers are also requested to complete a **Legal Entity Form** found in **Annex D**, accompanied by all documents and information indicated in the form.

The Legal Entity Form should be completed and signed by the representative(s) of the tenderer (who sign(s) the cover letter as per point 4 of the Invitation to tender) authorised to sign contracts with third parties.

The Legal Entity Form should not be submitted by sub-contractors (if any).

4. ADDITIONAL INFORMATION CONCERNING PARTICIPATION TO THIS TENDER PROCEDURE

Participation in Cedefop tendering procedures is open on equal terms to all natural and legal persons or groupings of such persons (consortia) falling within the scope of the Treaties. It includes all economic operators registered in the EU and all EU citizens. Pursuant to Article 119 of the general Financial Regulation the participation is also open to all natural and legal persons from non-EU countries that have a ratified agreement with the European Union in the field of public procurement on the conditions laid down in that agreement. Cedefop can therefore accept offers from and sign contracts with tenderers from 36 countries, namely: the 28 EU Member States, 3 EEA Countries (Liechtenstein, Norway, Iceland) and 5 SAA Countries (FYROM, Albania, Serbia, Montenegro and Bosnia & Herzegovina).

The procurement (tender) procedures of Cedefop are **not** open to tenderers from GPA countries.

A legal person can take part (as an individual tenderer or as a member of a consortium submitting a tender) in only one tender. In the opposite case all tenders in which that person has participated may be excluded from the evaluation.

4.1. Joint Offers/ Groupings (Consortia)

- Groupings (consortia), irrespective of their legal form, may submit a tender on condition that it complies with the rules of competition. A consortium may be a legally-established permanent grouping, or informally constituted group of tenderers submitting an offer (joint offer) for a specific tender procedure.
- Cedefop does not require consortia (if any) to have a given legal form in order to submit a tender, but reserves the right to require a consortium to adopt a given legal form before the contract is signed (if this change is necessary for proper performance of the contract). This can take the form of an entity with or without legal personality but offering sufficient protection of the contractual interests of Cedefop.
- If awarded the contract, the tenderers of the group (consortium) will have an equal standing towards Cedefop in executing it.
- A grouping (if any) of firms must nominate one party to be responsible for the receipt and processing of payments for members of the grouping, for managing the service administration, and for coordination.
- Tenders submitted by consortia of firms must specify the role, qualifications and experience of each member or of the group (please fill-in the respective Questionnaires in Annex G).
- Each member of the group (consortium) must provide the required evidence for the exclusion and selection criteria. Concerning the selection criteria, the evidence provided by each member of the group (consortium) will be checked to ensure that the consortium as a whole fulfils the criteria.
- The offer has to be signed by all members of the group (consortium). However, if the members of the group so desire they may grant an authorisation to one of the members of the grouping (consortium). In this case they should attach to the offer a power of attorney (see model in Annex I) authorising this company or person to submit a tender on behalf of

the grouping (consortium). For groupings not having formed a common legal entity, Annex I, model 1 should be used and separate legal entity forms (see point 3.3 and Annex D) should be completed and signed by all members. For groupings with a legal entity in place, Annex I, model 2 and one legal entity form (see point 3.3 and Annex D) should be completed and signed only by the single representative of the consortium.

The contract will have to be signed by all members of the group (consortium). If the members of the group (consortium) so desire, they may grant authorisation to one of the members of the grouping by signing a power of attorney. The same model as above duly signed and returned together with the offer (Annex I) is valid also for signature of the contract.

Partners in a joint offer assume joint and several liability towards Cedefop for the performance of the contract as a whole.

4.2. Subcontracting/Subcontractors

Subcontracting is defined as the situation where a contract has been or is to be established between Cedefop and a contractor and where the contractor, in order to carry out that contract, enters into legal commitments with other entities for performing part of the service. If awarded, the contract will be signed by the selected Tenderer (the Contractor), who will be vis-à-vis Cedefop the only contracting party responsible for the performance of this contract. Cedefop has no direct legal commitment with the subcontractor(s).

The contractor retains full liability towards Cedefop for performance of the contract as a whole. Cedefop will treat all contractual matters (e.g. payments) with the contractor, whether or not some tasks are performed by a subcontractor. Under no circumstances can the contractor avoid liability towards Cedefop on the grounds that the subcontractor is at fault. 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. In the latter case subcontracting/subcontractor will be accepted only if it is judged necessary and does not lead to distortion of competition.

Tenderers are free to choose their subcontractors from both eligible and non-eligible countries. Thus, in principle all economic operators can act as subcontractors of eligible tenderers.

The tenderer must clearly indicate the identity of each Subcontractor and the percentage of work by value that he will perform for this contract (please fill in Annex G).

Only in cases when:

- a Subcontractor undertakes between 10,01% and 40% of the work by value,
- the total subcontracting is above 40% of the work by value, independently of the individual Subcontractor's contribution to the work by value,

the tenderer should submit with the offer:

1. the **“Declaration on honour on exclusion criteria and selection criteria”** (Annex C) filled-in and signed by the respective Subcontractor;

2. the documents related to the economic/financial and technical/professional capacity of the Subcontractor as described in points 3.2.1 and 3.2.2 necessary for evaluating of the combined capacity (as a whole) of the tenderer together with his subcontractor(s);
3. the Form in Annex J (Model of Letter of Intent for Subcontractor/s) duly filled-in and signed by each respective Subcontractor, stating his unambiguous undertaking to collaborate with the tenderer if the latter wins the contract. Also should be stated the roles, activities and responsibilities of the subcontractor(s) and the extent of the resources that the respective subcontractor will put at the tenderer's /contractor's disposal for the performance of the contract;

N.B. The subcontractor(s) (if any) have to provide the documents to prove their capacity only for the parts of the contract that are relevant to them. The evidence provided will be checked to ensure that the tenderer alone or with the subcontractor(s) altogether fulfil the criteria.

5. AWARD OF THE CONTRACT

The evaluation of the exclusion, selection and award phase will be done in **NO** particular order. If the tenderer or the tender does not pass a phase, it will not be evaluated under the other remaining phases.

The contract shall be awarded to the tenderer submitting the best price-quality ratio method as represented by the highest Total Score (TS) out of 100.

The Total Score (TS), comprising quality + price score, will be calculated for each tender by applying the formula below:

$$\text{Total Score (TS)} = X \cdot (\text{TQV} / 100) + Y \cdot (\text{Cheapest TFO} / \text{TFO})$$

Whereby:

TQV = Total Quality Value of the tender (as per points 5.1 and 5.2);

TFO = Total Financial Offer of the tender (as per points 5.3 and 5.4);

X is the weighting for quality score (TQV) and for this tender procedure it is fixed to **(60)**;

Y is the weighting for price (TFO) and for this tender procedure it is fixed to **(40)**.

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved in total a minimum of **60** out of 100 points (TQV) in the technical evaluation – see below).

5.1. Technical evaluation

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 tender specifications.

The following Award Criteria for the technical evaluation, as per the requirements of section 2. Of this specifications, will be applied to this tender procedure:

Award criteria	Maximum number of points
1. Quality of communication and customer relation	15
Q1. Customer care	5
Q2. Incident management support	5
Q3. Training for the use of the electronic resources	5
2. Relevance of the ordering procedure	25
Q4. Acceptance and ability to deal with mid-year subscriptions	15
Q5. Orders' procedure	5
Q6. Free trials offer	5

3. Access delivery	50
Q7. Contact with publishers	5
Q8. Access method	20
Q9. Discovery service	25
4. Transfer of subscriptions from the previous Contractor and to the next Contractor	10
Q10. Transfer of subscription from another Contractor	5
Q11. Transfer of subscription to another Contractor	5
Overall total score (Total Quality Value -TQV)	100

In order to guarantee a minimum threshold of quality, offers that obtain an overall total score (Total Quality value) of less than the total **60** (of a maximum of 100) points against the award (technical) criteria, will not be considered acceptable and will be eliminated from further evaluation. Only the technically compliant (acceptable) tenders as per the above will be subject to Financial (Price) Evaluation (5.3).

5.2. Technical proposal

The tenderer's technical proposal should consist of a clear and comprehensive response to all requirements as per the Terms of Reference in point 2 above providing a practical, detailed description of the services proposed for performance of the contract.

Tenderers are requested to organise the technical offer in headings or to structure it in such a way so as to ensure that the content of the technical offer meets the requirements set out in the Terms of Reference as closely as possible and to facilitate the subsequent evaluation of tenders against the technical award criteria.

The Technical Proposal should prove that the Tenderer is capable of meeting the tender specifications, by providing all the information related to the scope of this project. All the information and means of proof provided in the tender commit the contractor throughout the duration of the contract.

In addition to the above, the tenderer must clearly specify which parts of the work will be subcontracted (if any) and specify the identity of those subcontractors only undertaking more than 10% of the work by value (or of all subcontractors if total subcontracting is above 40% of the work by value) as requested in point 4.2.

NB: All the information and means of proof provided commit the contractor throughout the duration of the contract.

For the technical evaluation of the offer against the award (technical) criteria mentioned above, the tenderer must provide detailed descriptions for the following services. The technical proposal including all answers from Q1 to Q11 should not exceed a **maximum of 10 pages**.

For award criterion 1:

Customer care

Q1. Please describe how you will provide the basic service regarding the communication and customer relation.

Incident management support

Q2. Please describe your policy of incident management and response time.

Training for the use of electronic resources

Q3. Describe your training policy regarding the use of the electronic resources.

For award criterion 2:**Orders' timing**

Q4. Please describe your ability to deal with mid-year orders for access to an annual subscription, independently of the moment of the year.

Orders' procedure

Q5. Please provide a description of the orders process.

Trials

Q6. Please explain how you will provide free trials, in collaboration with the publishers.

For award criterion 3:**Contact with publishers**

Q7. Please explain how you will provide the required services in a way that Cedefop will need a minimal interaction with the publishers.

Access method

Q8. Please describe the steps to ensure the access to the offices in Thessaloniki and Brussels and remote access for staff from home or while traveling (through OpenAthens).

Discovery service

Q9. Please describe your ability to provide the Summon discovery service and the support you are able to provide regarding further technical assistance.

For award criterion 4:**Transfer from the previous Contractor**

Q10. In case online subscriptions are transferred from another agent, please explain how you will manage the transfer.

Transfer to the next Contractor

Q11. Please describe your procedure of transfer of the subscriptions to another agent at the end of the contract.

5.3. Financial evaluation

Only tenders scoring in total **60** points or more (of a maximum of 100 points) against the technical award criteria will have their financial proposal evaluated. The evaluation will be made on the basis of the **Total Percentage** offered (**Total Financial Offer TFO**) in Annex H – Financial Proposal (see point 5.4).

The tenders are awarded points for the Total Price offered by using the following formula:

Financial score = (cheapest Financial Proposal / Financial Proposal of the tender considered) Y.*
Where Y = price weighting (see the complete formula under point 5 above)

Information concerning price

- The percentage offered must be fixed and not revisable for each year of the contract.
- Prices 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 shall therefore not be included in the calculation of the price quoted.

 [For contractors based in Greece, invoices will include VAT which is paid by Cedefop and later reimbursed by the State.]

 [For contractors established in other countries exemption is direct (invoices are submitted without VAT), subject to fulfilling as necessary the requirements of Article 151 of Council Directive 2006/112/EC.]

 [In Belgium, use of this contract constitutes a request for VAT exemption No. 450, VAT exemption article 42, paragraph 3.3 of the VAT code (circular 2/1978), provided the invoice includes: "Commande destinée à l'usage officiel de l'Union Européenne, Exonération de la TVA; art. 42 § 3.3 du code TVA (circulaire n° 2/1978)".]

5.4. Financial Proposal / Financial Scenario

Tenderers should not disclose their financial offer in any part of their tender (technical proposal, cover letter) other than the sealed envelope C.

The financial offer must be clear and in compliance with the tender specifications.

The tenderer is requested to fill in the table (Financial offer) by introducing a percentage offered to the publisher's pricelist and other subscriptions as indicatively indicated in Annex K.

6. INFORMATION ON PRESENTATION AND CONTENT OF TENDER

It is important that tenderers provide all documents necessary to enable the evaluation committee to assess their tender. Tenderers should fully respect the instructions indicated under points 2, 3 and 4 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:

- cover letter, signed by the person/s (name and position) that is/are authorised to sign the contract in case of contract award;
- the **“Declaration on honour on exclusion criteria and selection criteria”** requested in point 3.1 and standard template found in Annex C;
- the selection criteria documents as requested in points 3.2, 4.1, 4.2;
- Questionnaires 1 – 5 as found in Annex G;
- Power of Attorney (Model 1 or 2), as required in point 4.1 (if applicable) and found in Annex I;
- Model of Letter of Intent for Subcontractor/s as required in point 4.2 (if applicable) and found in Annex J;
- the Legal Entity Form as requested in point 3.3 and found in Annex D;
- the Financial Identification Form as found in Annex E;
- the checklist found in Annex F;

In the case of tenders submitted by groupings (consortia) or involving contribution by subcontractors, envelope A should also contain all relevant documentation as requested in points 4.1 and 4.2 respectively (with reference to points 3.1, 3.2 and 3.3).

6.2. Envelope B – Technical proposal

One original signed version and three copies of:

- the Technical Proposal providing all information requested in point 5.2, including information relevant to subcontracting, if any, as requested in point 4.2.

6.3. Envelope C – Financial proposal

One original signed version and three copies of:

- the Financial Proposal and Annex H containing all information requested in point 5.4.

ANNEX A

Contract Notice

(Given as a separate file in *.pdf format)

ANNEX B

Draft Contract

(Given as a separate file in *.pdf format)

ANNEX C

“Declaration on honour on exclusion criteria and selection criteria”

(Given as a separate file in *.doc format)

ANNEX D

Legal Entity Form

Legal Entity Form to be downloaded, depending on the nationality and legal status of the tenderer, from the following website:

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

Legal Entity Form to be completed and signed by a representative of the tenderer (group leader in case of consortium, with indication of entity, name and function) authorised to sign contracts with third parties. It should not be signed by sub-contractors (if any).

ANNEX E

Financial Identification Form

To be downloaded, depending on the nationality of the tenderer, from the following website:

http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_fr.cfm

and completed and signed by an authorised representative of the tenderer (group leader in case of consortium, with indication of entity, name and function), but not by subcontractors.

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

Mandatory documents to be included as part of the tender	Reference paragraph	Included		If the document is not included, please explain the reason
		Yes	No	
<u>Envelope 'A' must contain</u>				
one original and one copy of:	6.1	☐	☐	
- Cover letter, signed by the person/s that is/are authorised to sign the contract in case of contract award (name and position of the individual(s))	Art. 4 of Invitation to tender; 6.1	☐	☐	
- Declaration on Exclusion & Selection Criteria (including those of consortium members and subcontractors, if applicable)	3, 6.1 & Annex C	☐	☐	
- selection criteria documents (if applicable, including those of consortia and subcontractors)	3.2, 4.1, 4.2, 6.1	☐	☐	
- Questionnaires 1 - 6 (Annex G)	3.2, 4.1; 6.1 & Annex G	☐	☐	
- Power of attorney of partners in joint bid / Consortium (if applicable)	4.1, 6.1 & Annex I (model 1 or 2)	☐	☐	
- Letter of intent of subcontractor (if applicable)	4.2, 6.1 & Annex J	☐	☐	
- Legal Entity Form	3.3, 6.1 & Annex D	☐	☐	
- Financial Identification Form	6.1 & Annex E	☐	☐	
- this Checklist	6.1 & Annex F	☐	☐	
<u>Envelope 'B' must contain</u>				
one original and three copies of:	6.2	☐	☐	
- the technical proposal	2, 5.2, 6.2	☐	☐	
<u>Envelope 'C' must contain</u>				
one original and three copies of:	6.3	☐	☐	
- the Financial Proposal	5.4, 6.3 & Annex H	☐	☐	

The tenderers should also ensure that:

☐	the 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 duly authorised agent.
☐	the offer is perfectly legible in order to rule out any ambiguity.
☐	the 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.

ANNEX G

Questionnaires 1 - 5

(Given as a separate file in *.doc format)

ANNEX H

Financial Proposal

(Given as a separate file in *.doc format)

ANNEX I

Models of power of attorney

(Given as a separate file in *.doc format)

ANNEX J

Model of Letter of Intent for Subcontractor/s

(Given as a separate file in *.doc format)

ANNEX K

Sample list of resources

(Given as a separate file in excel format)