

TENDER SPECIFICATIONS

No EEAS-486-DELRUSM-SER-DIR

Contract notice in OJ 2016/S 120-212902

EU STUDY WEEKS IN RUSSIA 2016-2020

Services contract

RESTRICTED PROCEDURE

FIRST STAGE

IMPORTANT INFORMATION!!

Due to its confidential nature the technical specifications cannot be disclosed to all candidates but only to the ones successful in the first stage of this procedure.

DO NOT SUBMIT the technical and financial offers at this first stage. Only the tenderers receiving a second letter with the invitation to tender and the complete technical specifications at the second stage will be invited to submit its technical and financial offers. For the details, please see point 3 of this document.

Table of Contents

1.	INTRODUCTION	3
2.	SUBJECT OF THE CONTRACT.....	3
3.	DESCRIPTION OF PUBLIC PROCUREMENT PROCEDURE	3
4.	GROUPS OF ECONOMIC OPERATORS AND SUBCONTRACTING	4
4.1.	Joint tender	4
4.2.	Subcontracting	5
5.	ELIGIBILITY OF ECONOMIC OPERATORS.....	5
5.1.	Access to public procurement	5
5.2.	Non-exclusion of economic operators	5
5.3.	Selection of economic operators	6
5.3.1.	Legal and regulatory capacity criteria and evidence	6
5.3.2.	Economic and financial capacity criteria and evidence.....	7
5.3.3.	Technical and professional capacity criteria and evidence	8
6.	TECHNICAL SPECIFICATIONS.....	11
7.	EVALUATION OF TENDERS ON THE BASIS OF THE AWARD CRITERIA.....	11
7.1.	Technical tender	11
7.2.	Financial tender	13
7.3.	Calculation of the overall score	13
8.	CONTENT OF THE REQUEST TO PARTICIPATE.....	14

1. INTRODUCTION

The contracting authority is the European Union (hereinafter referred to as "contracting authority"), represented by the Head of the Delegation of the European Union in Russia or its duly authorized representative.

The contracting authority plans to conclude a service contract for organisation of a **series of EU Study Weeks in 2016-2020**, in accordance with the specifications set out below and the contract in annex.

When drawing up their tenders, tenderers shall take into account the provisions in these tender specifications, in the letter of invitation to tender as well as in the contract, which specify the rights and obligations of the contractor, particularly those on payments, performance of the contract, confidentiality, checks and audits.

The model contract that will be used for this contract is attached to the letter of invitation to tender in Annex 2. These tender specifications and the tender submitted by the awardee of the contract will be annexed to the contract and therefore be binding on the contracting parties during the implementation of the contract.

A notice for this contract was published in the Official Journal of the European Union 2016/S 120-212902 of 24.06.2016

2. SUBJECT OF THE CONTRACT

The contract covers organisation of the series of the EU Study Weeks (EUSW) for undergraduate and postgraduate students. On the average four Study Weeks and one alumni gathering should be organized within 12-months period starting from the signature of the contract: one 5-day EU Study Week for 40 participants, three 3-day EU Study Weekends for 30 participants each, and one alumni meeting for 30 participants. The contractor will also manage EUSW alumni and web space.

The contractor must provide the human and material resources necessary to provide the service in the non-exhaustive list below:

- Selection of participants and lecturers
- Programme development
- Management of logistics
- Host, technical support of the website, management and promotion of digital resources
- Management of alumni groups

The place of performance is Russia.

3. DESCRIPTION OF PUBLIC PROCUREMENT PROCEDURE

This tender will be taking place in two stages, as follows:

A. First stage (selection stage):

In order to participate, candidates shall submit a letter presenting the name of the candidate, including all entities in case of a group and the name of the single contact person in relation to this request. An e-mail address and/or a fax number of the candidate shall be provided. It is the responsibility of the candidate to regularly consult the e-mails received.

In an annex to this letter, candidates shall submit ALL the information requested in point **5. "Eligibility of economic operators"** of the tender specifications, namely evidence on the access to public procurement, declaration on honour on exclusion criteria and evidence on selection criteria.

B. Second stage:

Candidates shortlisted at the end of the selection stage (every economic operator complying with the access, exclusion and selection criteria evaluated during the selection stage) shall be invited to submit a tender. The following procurement documents will be sent to them directly:

- the letter of invitation to tender,
- the technical specifications,
- the statement of compliance with the procurement documents.

Only at this second stage the tenderer submits its technical and financial offers.

4. GROUPS OF ECONOMIC OPERATORS AND SUBCONTRACTING

Tenders or requests to participate can be submitted by a single economic operator or jointly by two or more economic operators.

4.1. Joint tender

A joint tender is a situation where a tender is submitted by a group of economic operators. The cover letter to the tender and request to participate must be signed by a duly authorised representative of each member and indicate the leading member with its e-mail address and/or fax number.

In this case, the tender will clearly identify the division of tasks amongst the different operators.

Once the tender has been submitted, any change in the composition of the tenderer is not allowed, unless in the meantime one or more operators within the tenderer has been subject to a merger or a takeover (universal succession), and shall lead to the rejection of the corresponding tender.

The group will not be required to adopt a specific legal form in order to submit a tender.

If the contract is awarded to a group, the contracting authority may require the group to adopt a specific legal form after the award and prior to the signature of the contract. If the group is legally constituted (consortium), the contracting authority will sign the contract with the entity representing the group (consortium). Otherwise, the contract will be signed with all economic operators of the group. In this case, one of its members will be nominated "the leader" and will have full authority to bind the group and each of its members, and will be in charge of the administrative management of the contract (contact point, invoicing, receiving payments, etc.) on behalf of all other entities. The leader will receive power of attorney from the other members of the group to this end.

In any case, each member of the group will assume joint and several liabilities towards the contracting authority for the performance of the contract as a whole.

The already legally constituted consortium must have its own Legal Entity Form which is different from the Legal Entity Form of each individual member of the group.

4.2. Subcontracting

Subcontracting is allowed but the contractor will retain full liability towards the contracting authority for performance of the contract as a whole.

Tenderers must give an indication of the proportion of the contract that they intend to subcontract and are required to identify all subcontractors whose share of the contract is above 10%.

The subcontractors whose share of the contract is above 10% must comply with the same exclusion and selection criteria on technical and professional capacity applicable to tenderers and shall present exclusion and selection documents.

During contract execution, the change of any subcontractor identified in the tender will be subject to prior written approval of the contracting authority (see art. II.10 of the contract)

5. ELIGIBILITY OF ECONOMIC OPERATORS

5.1. Access to public procurement

Participation in this tender procedure is open on equal terms to all natural and legal persons:

- in one of the European Union Member States;
- in a third country which has a special agreement with the European Union in the field of public procurement¹ on the conditions laid down in the agreement;
- exceptionally, in Russia - the country of the EU delegation

Economic operators, including each member of a joint tender, must confirm that they have their headquarters or domicile in one of the abovementioned States and present the supporting evidence normally acceptable under their own law.

5.2. Non-exclusion of economic operators

Economic operators who have access to public procurement are evaluated on the basis of the information provided in their tenders for exclusion criteria.

Tenderers shall provide a declaration on exclusion criteria attached to the tender specifications dully filled in, signed and dated by the legally authorised representative.

¹ **FYROM, Albania, Montenegro and Serbia** (under the Stabilisation and Association Agreement), **Iceland, Norway and Liechtenstein** (under the EEA Agreement economic operators from these countries have full access to tendering procedures of the Union institutions, agencies and bodies), **Mexico, Chile, Colombia and Peru, Iraq, Korea** and Central American countries of **Honduras, Nicaragua and Panama**.

The declaration on exclusion criteria shall be provided by each member of the group in case of joint tenders and by an entity on whose capacity it intends to rely and by all identified subcontractors whose share of the contract is above 10%.

Whenever requested by the contracting authority, the candidate or tenderer, as well as the entity on whose capacity the candidate or tenderer intends to rely shall provide the supporting documents confirming the declaration.

The successful tenderer, including each member of the group in case of joint tender, to whom the contract is to be awarded shall provide, within a time limit defined by the contracting authority and preceding the signature of the contract, the evidence referred to in paragraph "Evidence upon request", confirming the declaration.

The contracting authority may waive the obligation for a candidate or tenderer to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year earlier and are still valid at the date of their request by the contracting authority. In such cases, the candidate or tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure and confirm that there has been no change in the situation.

The contracting authority may also waive the obligation for a candidate or tenderer to submit the documentary evidence if it can access it on a national database free of charge.

5.3. Selection of economic operators

Tenderers must prove their legal, regulatory, economic, financial, technical and professional capacity to perform the services subject to this call for tender by meeting the selection criteria and minimum requirements listed in points 5.3.1, 5.3.2 and 5.3.3 hereafter.

Each candidate shall submit the evidence on selection criteria in their request to participate (first stage, see also point 3 of the tender specifications), respecting the requirements of the summary table here below.

If a tenderer is relying on the capacities of other entities (e.g. parent company, other company in the same group, or third party) in order to achieve the required level of economic, financial, technical and professional capacity, its tender must contain a signed and dated statement by the concerned entity declaring firmly that the relevant resources shall be made at the disposal of the tenderer for the performance of this contract. The contracting authority will verify whether the entities on whose the tenderer intends to rely fulfil the relevant selection criteria. The tenderer may only rely on the technical and professional capacities of other entities where the latter will perform the services or works for which these capacities is required.

If an entity provides the whole or a very large part of the financial capacity to the tenderer, the contracting authority may demand that the said entity be jointly liable for the performance of the contract. It may require that it signs the contract or that it provides a joint and several first-demand guarantee, should that tenderer be awarded the contract. If this entity is required to sign the contract, it has to have access to public procurement and shall not be in an exclusion situation as indicated in point 5.1 and 5.2 of the tender specifications.

5.3.1. Legal and regulatory capacity criteria and evidence

No specific legal and regulatory capacity and evidence is required from the economic operators for this call for tenders.

5.3.2. Economic and financial capacity criteria and evidence

Tenderers must prove the financial and economic capacity to perform this contract by meeting the following criteria:

Evidence on selection criteria: 5.3.2. Economic and financial capacity	Each economic operator involved in the tender separately	At least one economic operator involved in the tender (it shall be the one who will be responsible for the relevant part of the contract during its performance)	Cumulative for a tenderer as a whole	Subcontractors whose share of the contract is above 10 %
5.3.2 a) financial statements for the last three financial years for which accounts have been closed	X			X
Minimum capacity level required: The financial statements shall contain balance sheet and a statement of income. If the extracts are provided, the information in them shall correspond to the information usually provided in a balance sheet and a statement of income.			X	
5.3.2 b) a declaration of the annual overall turnover of the last three financial years for which accounts have been closed	X			X
Minimum capacity level required: The amounts declared for the overall turnover, at least, must be verifiable with the amounts in the financial statements submitted under point a) above	X			
5.3.2 c) a declaration of the annual turnover concerning the				

services subject to this tender (see the list under point 2) during the last three financial years for which accounts have been closed concerning the same legal entity as under points a) and b) above.	X		X	X
Minimum capacity level required: The average annual turnover concerning the services subject to this tender (see the list under point 2) for the last three financial years for which accounts have been closed must be at least EUR 140 000. The exchange rate used to convert the turnover into euros will be the rate of December of the year of the financial statement as published at http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm .			X	

In case the candidate is a group of economic operators, a consolidated assessment of the minimum capacity levels of all the members together will be made.

The declarations b) and c) may have a form of the following table:	Year 2013	Year 2014	Year 2015	Average for these three years
Annual overall turnover				
Annual turnover concerning the services subject to this tender				

5.3.3. Technical and professional capacity criteria and evidence

The tenderers are obliged to indicate the names and professional qualifications of the staff assigned to performing the contract.

The following key experts in charge of this contract are required as a minimum: Team Leader, Project Manager, and Moderator.

They should have the following qualifications:

Team Leader:

- University degree in management, business, political science, international relations or related field;
- At least 10 years of management experience;
- Experience in management of logistically complex, multi-component projects in Russia;
- Basic knowledge of European and EU-Russia affairs;

- Proficiency in English.

Project Manager:

- University degree in management, business or related field;
- At least 5 years of experience in event management in Russia;
- Experience in working with young people;
- Basic knowledge of European and EU-Russia affairs;
- Proficiency in English

Moderator:

- University degree in political science, international relations, journalism or related field;
- Excellent knowledge of EU and EU-Russia affairs;
- Proven experience in moderating at least 10 similar types of events.
- Good contacts in academic circles related to European Studies;
- Proficiency in English and Russian.

Tenderers must prove the technical and professional capacity to perform this contract by meeting the following criteria:

Evidence on selection criteria: 5.3.3. Technical and professional capacity	Each economic operator involved in the tender separately	At least one economic operator involved in the tender (it shall be the one who will be responsible for the relevant part of the contract during its performance)	Cumulative for a tenderer as a whole	Subcontractors whose share of the contract is above 10 %
5.3.3 a) a list of the services contracts of the candidate/tenderer relevant to the services indicated under point 2, concerning at least one of the past three financial years for which financial statements have been submitted (see point 5.3.2 a)), with the annual contract value, the duration	X			X

(start and end date) and the client				
Minimum capacity level required: The candidates/tenderers must provide at least two clients' reference letters in the fields related to the services contracts as described in point 2 during the last three financial years specifying whether the services have been carried out in a professional manner in compliance with the contractual terms. These proofs letters must relate to any of the services included in the list under point a).			X	
5.3.3 b) a declaration on the average annual manpower employed by the candidate in each of the last three financial years for which financial statements have been submitted (see point 5.3.2 a) in the fields related to services as described under point 2.	X			X
Minimum capacity level required: The average annual number of staff in the fields related to services as described under point 2 over the last three financial years for which financial statements have been submitted (see point 5.3.2 a)) must be at least 6 .			X	
5.3.3 c) Curriculum Vitae (CV) of the persons within the tenderer in charge of this contract, including the managerial staff. Each CV shall indicate the educational qualifications as well as the professional experience. For each person, the intended function in the contract shall be indicated.	X			X
Minimum capacity level required: The educational and professional qualifications of key experts in charge of this			X	

contract shall match the requirements laid down in point 6 of the Tender Specifications. The tenderers must provide at least 2 reference letters for each of the key team members listed in point 6 of the Technical Specifications.				
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In case the candidate/tenderer is a group of economic operators, a consolidated assessment of the minimum capacity levels of all the members together will be made.

The declaration b) may have a form of the following table:

	Year 2013	Year 2014	Year 2015	Average for these three years
Average annual manpower in the fields related to security services as described under point 2				

6. TECHNICAL SPECIFICATIONS

In order to protect the confidential nature of information contained in the tender specifications, the contracting authority will disclose the complete content of the technical specifications only to the candidates shortlisted at the end of the selection stage (every economic operator complying with the access, exclusion and selection criteria evaluated during the selection stage). **Only the tenderers receiving the invitation to tender and the technical specifications at the second stage will submit its technical and financial offers.**

7. EVALUATION OF TENDERS ON THE BASIS OF THE AWARD CRITERIA

The tenderers shall provide the "Statement of compliance with the tender documents" at Annex 1 duly dated and signed in order to be considered technically compliant.

The technically compliant tenders are evaluated in order to award the contract to the tender offering the best price quality ratio. For this purpose, the tender will be evaluated technically and financially.

7.1. Technical tender

The technical quality of the tenders will be evaluated on the basis of documents provided by the tenderers in the technical tender with regard to the award criteria. Each criterion is assigned a mark by the contracting authority on the basis of the scale in the table here below.

Technical award criteria

No	Description	Max. number points	Criteria
1	<p><u>Organisation of the services</u></p> <p>This criterion will enable to assess the organisation of the services offered by the tender, including the different members of a joint tender and the resort to subcontractors. Tenderers will develop in detail the organisation they offer in particular provide detailed information for each questions.</p> <p>It also assesses the global allocation of time and resources to the contract and to each service, and whether this allocation is adequate for the performance of the services.</p> <p>The tender shall provide details on the allocation of time and resources and the rationale behind the choice of this allocation.</p>	(50 points – minimum threshold 50%)	<ul style="list-style-type: none"> • how the tenderer understands the objectives of the contract and services to be carried out; (10 points) • the methodology the tenderer offers to implement the project; (30 points) • how the project is planned and what timelines the tenderer establishes for proper completion of the tasks (10 points)
2	<p><u>Follow up strategy and instruments</u></p>	(30 points – minimum threshold 50%)	<ul style="list-style-type: none"> • What strategy is employed to promote alumni association and pool of experts (15 points) • How promotion of EU debate and EU related information through social networks and on the internet will be implemented (15 points)
3	<p><u>Quality control measures.</u></p> <p>This criterion will enable to assess of the quality control system applied to the service foreseen in these tender specifications and continuity of the service in case of</p>	(20 points – minimum threshold 50%)	<ul style="list-style-type: none"> • How the services are monitored and evaluated in order to guarantee their quality. (10 points) • What mechanisms are employed to tackled unforeseen situations both regarding organizational matters,

	absence of the members of the team. The quality system shall be detailed in the tender and specific to the services at hand; a generic quality system will result in a low score.		and human resources. (10 points)
	TOTAL	100	

Any tender not scoring the minimum quality threshold of 50% of the points for each criterion and 60 *points* for all the criteria combined will be eliminated.

7.2. Financial tender

The prices for the tender must be tendered:

- in EUR. As the award of the contract is published in EUR, the official exchange rate that will be used for the value of the contract is the Inforeuro rate from the deadline of submission of the tender;
- free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under the Settlement agreement of 8 February 1991;
- all inclusive. This means that, unless otherwise mentioned in these tender specifications, prices tendered for shall include all the costs to be incurred by the tenderers in order to provide the services;
- using the price schedule (Annex A). Any change in the table as annexed to these tender specifications will lead to the rejection of the tender.

During the validity of the tender and the implementation of the contract, prices cannot be revised.

The price schedule is binding during implementation of the contract.

Only the financial tenders submitted by those tenderers who have obtained an overall technical score of 60 *points* or more and at least 50% of the maximum score allocated for each individual criterion will be opened.

Financial tenders will then be checked for arithmetical accuracy. Where arithmetical errors are found, tenderers will be requested to correct them.

7.3. Calculation of the overall score

The tender chosen will be that which offers the best price quality ratio among the technically compliant tenders, namely the tender obtaining the best overall score P_i calculated as follows where the weighting is 60% for the quality and 40% for the price:

$$P_i = T_i * 0.60 + F_i * 0.40$$

T_i = (technical quality score of the tender under consideration / score of the best technical quality tender) * 100

F_i = (cheapest total price for the scenario / price of the scenario of the tender under consideration) * 100

8. CONTENT OF THE REQUEST TO PARTICIPATE

Tenderers shall submit all the requested documents listed here for the first stage (selection stage).

The request to participate will contain:

1. a cover letter presenting the name of the candidate, including all entities in case of joint tender, and identified subcontractors whose share of the contract is above 10%, and the name of the single contact person in relation to this tender. The cover letter must indicate the proportion of the contract to be subcontracted. In case of joint tender, the cover letter must be signed by a duly authorised representative for each operator and indicate the leading member with its e-mail address. It is the responsibility of the tenderers to consult regularly the e-mails received;
2. a letter of intent for each subcontractor whose share of the contract is above 10% stating their willingness to provide the services foreseen in the tender and in line with the present tender specifications;
3. all the documents requested for the access to public procurement (point 5.1);
4. declaration on honour on the exclusion criteria (point 5.2);
5. all the documents requested for the selection criteria (point 5.3).