European Centre for the Development of Vocational Training

FINANCE AND PROCUREMENT

DRS/PRO/CALU/RB(2016)/02566
Thessaloniki, 21 December 2016

OPEN INVITATION TO TENDER

PROVISION OF SERVICES BY A PROFESSIONAL CONFERENCE ORGANISER
AO/DCM/CF/Professional conference organiser/020/16

REFERENCE: ***Contract notice - 2016/S 246-448985 of 21/12/16***

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.*

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

or

(b1) <u>by courier service</u> 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) <u>delivered by hand</u> 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.

The **<u>outer envelope</u>**, 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 **<u>inner envelope</u>**, 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 ***CEDEFOP No: AO/DCM/CF/Professional conference organiser/020/16*** ***"PROVISION OF SERVICES BY A PROFESSIONAL CONFERENCE ORGANISER"*** **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)	**20/01/2017**	N/A
Last date on which clarifications are issued by Cedefop	**24/01/2017**	N/A
Deadline for submission of tenders (hand delivered)	**31/01/2017**	17.00h
Deadline for submission of tenders by post / courier	**31/01/2017**	N/A

Validity of the tenders	**31/07/2017**	N/A
Tender opening session	**13/02/2017**	11.00h
Estimated contract signature date	**End of April 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 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 Regulation[1]. For more information, see the Privacy Statement on
    http://ec.europa.eu/budget/explained/management/protecting/protect_en.cfm

15. Once Cedefop has opened the tender, it becomes its property and it shall be treated confidentially.

[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.*

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/CF/Professional conference organiser/020/16

"PROVISION OF SERVICES BY A PROFESSIONAL CONFERENCE ORGANISER"

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

To provide people with the skills they need, vocational education and training systems (VET) need to adapt quickly to changing demands. European VET policy's central aim is to promote excellence through VET. To make it both an attractive learning option for the brightest and best young people and adults and an effective way of helping those with low levels of qualification to develop their skills.

Cedefop (the European Centre for the Development of Vocational Training), founded in 1975 and based in Greece since 1995, is a European Union (EU) agency. It supports the European Commission, Member States ([2]) and social partners by helping design VET policies that promote excellence and social inclusion and strengthen European cooperation in VET.

Cedefop's objective and priorities for 2012-16

Cedefop's activities are guided by its strategic objective and medium-term priorities 2012-16. Cedefop's strategic objective is to contribute to designing and implementing policies for an attractive VET that promotes excellence and social inclusion and to strengthening European cooperation in developing, implementing and analysing European VET policy. This objective is supported by three priorities:

- **Supporting modernisation of VET systems**

Modern VET systems must be relevant to individual and labour market needs. They should take into account learning acquired in different ways (for example through work experience) and at different times and allow people to move between countries and sectors.
Member States decide national VET policies and Cedefop monitors and reports on the reforms and changes they make to their systems. Cedefop also works to improve international VET statistics.

European cooperation in VET, led by the European Commission working with Member States and social partners, has agreed shared objectives. As part of this cooperation, Cedefop has helped develop, and is now working to implement, common European tools and principles, which aim to make it both easier to work and study abroad and move between different parts of a national education and training system (for example between general and vocational education).

- **Careers and transitions – Continuing VET, adult and work-based learning**

Today, people are likely to change jobs more often. Cedefop is looking at how continuing training and work-based learning for adults can help people to manage their careers better and improve their job prospects. Cedefop is also examining how work-based learning for adults can help enterprises to deal with technological change, generate innovation and increase competitiveness. New demands are also being made of VET teachers and trainers and Cedefop is looking at their changing roles and their skill and learning needs.

([2]) Cedefop also works with Iceland and Norway.

- **Analysing skills needs to inform VET provision**

Europe's growth and competitiveness will be held back if people's skills do not meet job requirements. Unemployment currently coexists with skill shortages. Understanding and anticipating the skills required helps ensuring that training meets labour market needs. It helps to promote a better match between individuals' potential and job requirements.

Cedefop's skill needs analysis provides insights into the trends that influence skill supply and demand and the imbalances that may arise both in the EU and individual Member States. Cedefop is also finding out more about sectoral and occupational developments, such as the demand for 'green' skills for sustainable growth and, as the population ages, the potential for jobs creation and impact of skill needs of the 'silver' economy.

Cedefop's information

Cedefop shares its expertise through its publications, networks, conferences, seminars and web portal www.cedefop.europa.eu. The web portal provides news on Cedefop's major themes "Identifying skills needs", "Understanding qualifications", "Analysing policy" and "Developing lifelong learning". 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 his 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

a) Title: Provision of services by a professional conference organiser.

b) Subject: The purpose of this contract is to acquire the services of a professional conference organiser to support Cedefop in the organisation of its events (conferences, seminars, workshops, other events). Services comprise inter alia contact with participants, accommodation, management of a participants' database, preparation and printing of documents and on-site secretariat.

c) 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

Most of the time, tasks will be completed in the Contractor's premises and in Cedefop's premises, 123 Europe str., Pylea, Thessaloniki as well as hotels and other venues in Thessaloniki. Sometimes, however, tasks will need to be delivered in Brussels or exceptionally, in other European countries (e.g. presidency countries).

1.3. Division into lots

This tender procedure <u>is not divided into lots</u>.

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 estimated budget for the required services described in this call for tenders is of the order of **850,000 EUR** (**without VAT**) over a **4** year period. Tenderers should be aware that the information on volume is purely indicative, 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 a.m. estimated value for the Framework Contract. Both parties will be contractually bound by the order forms (or amendments to these), signed by them for each specific assignment. The total value of the framework contract will ultimately depend on the orders which Cedefop may place through Orders Forms (for more details see annex L).

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

2.1. Background

In line with its communication strategy, Cedefop reaches out to its stakeholders both to disseminate the results of its work and to engage them actively in its work. Cedefop's three expert departments, its directorate and its communication department regularly organise events to exchange views with stakeholders on ongoing work, to present the results of Cedefop's expert work, to launch a publication, a website/online platform or another initiative, or to inform a wider audience on European vocational education and training policies or tools.

Cedefop's meetings usually range in size from 15 to 200 participants; their duration is between ½ day and 2 days. Event types include conferences, seminars, workshops and technical meetings as well as special events or other event formats (working lunches and dinners, exhibitions, etc.). Some facts and figures on Cedefop's events can be found in annex K.

Cedefop meeting participants typically come from the EU Member States, other partner countries (such as Iceland, Norway, Turkey), the EU institutions (European Commission, European Parliament, other decentralised agencies) and international organisations (OECD, Unesco, World Bank, ILO..).

The majority of Cedefop's events are organised in its premises in Thessaloniki where substantial meeting facilities exist. Cedefop has three conference rooms with interpretation facilities catering for 150, 70 and 38 participants respectively.

Europa hall is the largest conference hall of the premises capable of accommodating 150 delegates. The hall has 12 interpretation booths, 11 for interpretation purposes, 1 of which doubles as an ENG Booth and 1 for the control room.

Montessori hall is the medium conference room and can accommodate 70 delegates. The hall has 6 booths, 5 for interpretation purposes and 1 for the control room of both Montessori and Emile Rousseau.

Emile Rousseau is the smallest conference room, accommodating up to 38 delegates. Two interpretation booths serve this hall.

The three conference rooms are located in the conference wing of Cedefop's building. There are reception desks in front of Europa and Montessori as well as shelves for displaying Cedefop publications and tables and chairs which can be arranged / removed according to needs.

Events are also organised in other venues in Thessaloniki as well as in Brussels and in presidency or other countries, either by Cedefop alone or in cooperation with a partner.

PCO services are especially needed for larger events/conferences: they often require complex logistics, some creativity (to handle an array of different needs) and flexibility (e.g. no sudden absences due to sickness), which Cedefop does not have the in-house resources to provide. Services required for such events typically comprise the accommodation of participants, catering, contact with participants, printing of documents, creating dedicated event websites, the management of a database of invitees, on-site secretariat, transfers and sometimes special programmes and entertainment.

Indicatively, during the last four years, Cedefop organised around seven conferences (including annual meetings of its Governing Board and networks) and six seminars and workshops per year with PCO support. A special event took place to mark Cedefop's 40th anniversary in 2015.

Cedefop's annual work programmes contain a list of planned events. This list is however indicative and does not commit Cedefop to the contractor in any way. Cedefop's events follow a cyclical pattern with peak periods of intense activity especially in the last quarter of the year.

2.1.1 General information related to the project

In the interest of the best possible performance of this contract, the professional conference organiser is required to make himself familiar with Cedefop, its mission and its stakeholders (who are participants of its meetings and events). Cedefop expects a tailor made approach for its clients, many of whom have been known to the organisation for a long period of time. Cedefop's invitees are a multilingual and multicultural group and awareness of cross-cultural differences is essential in dealing with them.

An inception meeting will take place in Thessaloniki as soon as the contract is signed. At the inception meeting, all information and templates necessary for the execution of the framework contract will be given to the successful tenderer (design/layout guidelines, workflows, disclaimers, logos etc.).

In principle, during the first three months of validity of the contract, cooperation will be fine-tuned, either on-site or via Skype meetings, to allow the PCO team assigned to the Cedefop contract to become fully acquainted with Cedefop's premises and facilities, the organizational structure, staff, event financial procedures, practices, tools.

The communication language with Cedefop in all correspondence related to the project implementation is English.

It may happen that some services, due to Cedefop's constraints (e.g. tight timeframe of cooperation with European Commission) or to unforeseen circumstances (e.g. transportation in case of strike), are requested at short notice.

Cedefop reserves the right to check the proposals submitted by the contractor (catering/ accommodation/ promotional material, etc.) – see specimen quotation in Annex H1 – and to choose the one offering best value for money. Cedefop may request a sample (e.g. of promotional material) before taking a decision.

In fulfilling the contractual obligations, the contractor should not take any discretionary power of judgment. For any decision which has an impact on costs and/or can be seen as an exception to the standards herein mentioned, the responsibility for approval lies with Cedefop and it must be agreed a priori with the Cedefop event officer (conference service), who should ensure that approval is granted by the hierarchy. The contractor should maintain complete documentary evidence of such agreements and attach it to the relative claims of payment.

Cedefop is committed to making its activities as much as possible environmentally friendly. Over the last years, it has managed to substantially reduce its environmental impact. The professional conference organiser is expected to incorporate sustainable practices throughout the overall planning process in the organisation of Cedefop events (e.g. replace paper through electronic communication or USB sticks for data storage).

Cedefop abides by the European Union's rules on data protection, namely Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December2000 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 (http://ec.europa.eu/justice/policies/privacy/docs/application/286_en.pdf). The professional conference organiser cannot use any of the data collected on behalf of Cedefop for its own purposes or for purposes others than those specified by Cedefop (see also Article I.9 of the draft Framework Contract attached in annex B).

2.1.2 Project management

For a successful implementation of the activities, the contractor will have to ensure the coverage of two distinct functions related to the overall management of the contract and the management of individual assignments. To this end, the contractor shall assign to this contract a dedicated team of three: 1 project leader and 2 project managers. One back-up project manager may be required at peak times.

- The *project leader* shall be responsible for the overall management of the contract: He/she is the main reference person (plus back-up staff as required) and will be responsible for
  - dealing with all communication with Cedefop's conference service and, where necessary, the hierarchical superior
  - agreeing on procedures and standards of operations in cooperation with Cedefop's event officer
  - managing and coordinating the delivery of all activities and services required by Cedefop according to contractual standards
  - ensuring that the same methodology and quality standards are applied by the contractor's staff through all Cedefop events
  - assessing risk and ensuring quality control of all activities performed by the contractor.

- A *project manager* shall be responsible for the implementation of each individual assignment: He/she is the main reference person and will coordinate operational staff as required. He/she will be responsible for
  - implementing logistical activities and services indicated by Cedefop's event officer in the event requirements according to contractual standards
  - providing advice and guidance on the event as a whole to the Cedefop's event owner
  - maintaining regular oral and written communication with participants and with the Cedefop event owner
  - reviewing actions on an ongoing basis and being proactive in proposing steps to enhance the impact of the activities
  - if necessary, coordinating with third parties who are involved with the Cedefop event
  - ensuring the full management of the event on site
  - reporting on technical and financial issues to Cedefop's event officer after the event.

On Cedefop's side, the Conference Service is responsible for the day-to-day management of this framework contract, in particular as regards general coordination, set-up and monitoring of procedures, quality standards and financial issues (*event officer*). Initial contacts for the organisation of any event (up to the signature of the order form) are always between the professional conference organiser and the event officer.

Cedefop's Stakeholder Relations officer has the overall responsibility for this framework contract. The Head of Cedefop's Communication department is the authorising officer for the budget. A detailed description of the workflow is to be found in annex L.

Following acceptance of the financial offer, subsequent contacts for the implementation of the services are with the various Cedefop *event owners*, as the management of each individual assignment will lie with the event owner in the initiating department. The event owner will appoint a member of staff as logistics coordinator, who will be the main liaison person for the conference organiser's project manager appointed to the event: he/she will oversee the implementation of the assignment and deal with all issues arising from the daily implementation of activities, according to the modalities described by this contract.

2.1.3 Requirements concerning Contractor's staff

The contractor shall assign staff with the qualifications needed to ensure high level service to each specific event, in particular with regard to peak periods. In addition they must be able to respond to any request from Cedefop or event participants in the shortest time possible, in particular as regards point 3 (Communication with participants) of the specific activities listed in point 2.9.1. of these tender specifications.

The contractor shall guarantee that the team assigned to the Cedefop contract is properly staffed to ensure a consistent high level of performance in accordance with the contractual obligations, taking into account any variations in Cedefop's event cycle.

The working language of Cedefop meetings is mainly English; however, in Governing Board meetings and some large conferences interpretation is provided. As Cedefop's meeting participants do not always communicate fluently in English the professional conference organiser should have staff able to communicate with delegates in other languages, if possible Greek, French, and German.

During the period of the framework contract, the contractor is obliged to ensure that the team is composed of at least the same number of people with similar skills and professional experience as proposed in the tender offer.
Cedefop may require one or more members of the team to be replaced if an adequate service is not provided in accordance with the contractual obligations.
In case of replacement of a team member by the contractor during the period of validity of the contract, the contractor must ensure the new member has the same level of qualifications as his/her predecessor and inform Cedefop of any such change in writing.

The duration of Cedefop's meetings and events is typically between a half-day and two days. Meeting hours are roughly as follows:

- morning sessions start any time between 8.30 and 10.00 and usually finish at 13.00 or 13.30;
- lunch is usually between 13.00 and 15.00;
- afternoon sessions typically start at 14.00 or 15.00 and end between 17.00 and 19.00.

On-site staff will have to cover these hours and the necessary time before the start and after the end of a meeting to ensure smooth operation. This means that a half-day meeting may entail six hours of work and a full-day meeting 10 hours of work for the on-site staff of the professional conference organiser.

2.2. Objective, purpose and expected results

2.2.1. Overall objective

The overall objective of this call is to acquire the services of a professional conference organiser to support Cedefop in the organisation of its events (conferences, seminars, workshops, other events).

2.2.2. Purpose – results to be achieved by the Contractor

The professional conference organiser is expected to provide advice, knowledge and administrative support to Cedefop for the full implementation of all aspects of event management, and will implement Cedefop's decisions, as laid out in the order form for each event.

PCO services shall be acquired on the basis of Cedefop's annual work programmes and any additional management decisions concerning the implementation of events.

2.3. Scope of work

The following section describes the main activities and services required for the organisation of Cedefop events.
The contractor will help prepare and implement Cedefop's meetings and events in close cooperation with Cedefop's in-house Conference Service (event officer) and the members of staff organising the various meetings (event owners).

The services are presented in alphabetical order. Cedefop may request some or all of the services listed depending on the purpose, size, duration and location of an event. .

1. Accommodation
2. Catering, meals and refreshments
3. Communication with participants
4. Database of invitees and list of participants
5. Documents and conference material
6. Event website
7. Facilitation/moderation
8. Interpretation
9. On-site secretariat
10. Photographic services
11. Protocol and security
12. Special programme and entertainment
13. Technology support services and equipment
14. Transfers and on-site transportation
15. Venue

1. Accommodation

Cedefop may require one or more of the following tasks:

- Search and identification of suitable hotels, according to the meeting requirements. The same quality standard (usually 3-5 stars) and a similar location should in principle be provided for all invited guests (to be defined by Cedefop if otherwise) and as many rooms as possible should be booked in a minimum number of hotels.

- Negotiation of preferential conditions and tariffs, complimentary rooms, parking spaces,

penalties and no-show policies. Negotiation of advantageous cancellation clauses. Flexibility is needed on deadlines for rooming lists and last minute changes.

- The room price in the proposed hotels should not exceed Cedefop's limit of allowance (currently 100 € per night for accommodation; at present, this limit applies both to Thessaloniki and Brussels but may be subject to adjustment). By way of exception, in cases duly justified with the prior agreement of Cedefop, and on the basis of three different hotel offers, the price per night of accommodation and per participant may exceed this ceiling. Unless otherwise indicated in the request of services, breakfast will be included in the room price.
- Submission of a written proposal (with at least 3 options) presenting the relevant features of the proposed hotels so that Cedefop may select the most appropriate one(s).
- Manage hotel reservations and provide early information to Cedefop's event owner about option deadlines, cut-off date and cancellation policy, including a clear policy on room guarantees (especially in case of hotel overbooking) and procedures for early arrivals and late checkouts.
- Payment of the hotel deposit: if required for the purposes of room reservation, the contractor must be able to make all the necessary provisions (such as guarantees and advance payment) to secure the reservation.
- The contractor may be requested to prepay the hotel on the basis of a previously agreed number of reservations. In this case, the contractor will settle the hotel bill for the agreed prepaid participants and include this hotel pre-payment in the invoice he submits to Cedefop and attach the relevant proof (hotel invoice).
- Preparation of the rooming list and transmission of the list to the hotel(s) within the appropriate deadline.
- Monitoring the rooming list changes (new reservations, cancellations and no-shows) and communicating with the hotel(s) as necessary in order to minimise penalties.
- Review hotel invoices (cross-checking hotel attendance lists, including no-show reports, against the organiser's list) to ensure that it fits with the financial agreement and the actual nights of accommodation.

The contractor will take care of hotel reservations for all participants who need it, regardless if they are self-paying or funded by Cedefop.

Cedefop usually offers participants single room accommodation including breakfast. Double rooms for accompanying persons shall be reserved only upon the event owner's request, and the additional cost will be at the participant's expense. All incidentals (such as mini-bar, pay TV, phone calls, hotel bar etc.) will also be at the participant's own expense.

Shared rooms do not form part of Cedefop's policy and must be avoided, even in emergency cases (such as overbooking).

The contractor will determine how many nights to reserve on the basis of the list of participants, the length of the conference and the flight schedules. Where special travel arrangements requested by participants require spending additional nights in the hotel, this must be authorised by Cedefop.

The contractor takes all necessary measures so that the requested cancellations are settled in the best interest of Cedefop. In case too many participants do not show up, leading to the hotel retaining part or all of the deposit, Cedefop underwrites it. In other words, the contractor shall not be held responsible for any deposit lost in this manner.

2. Catering, meals and refreshments

Lunches, dinners, coffee breaks and other networking occasions around food and drinks are usual components of Cedefop's events. Where indicated in the request for services, the contractor's tasks may include:

- Organisation of welcome coffee, coffee breaks and lunches at the venue in line with the programme of the event.
- Provision of refreshments and mineral water in conference and breakout rooms and interpreters' booths.
- Organisation of hot/cold lunch or dinner buffets/drinks, sandwich lunch breaks and seated lunches and dinners.
- Identification of suitable restaurants for official dinners.
- Organisation of receptions, cocktails, cocktail dinners, dinners including special programme and entertainment.

The contractor may be requested to submit up to three offers for catering services (including menus, venues and costs) to the Cedefop event officer for approval, unless differently agreed.

The contractor shall prepay catering and include the catering cost in the overall invoice he submits to Cedefop following an event.

The contractor shall take into account cultural or personal dietary requirements of participants (religious, vegetarian, allergies) and plan individual menus accordingly. In certain cases, a written description of the ingredients may be necessary.

A cross-check of the different menus offered at the same event should be carried out by the contractor to avoid duplication, including with regard to the meeting history, in case of regular meetings.

If needed, the contractor may be asked to ensure translation of menus in English and printed copies in line with the event graphics (logo, title and date of the event etc.). Seating order and place names may be required for official dinners.

The contractor may also be asked to provide staff (from arrival to departure of participants) to ensure a smooth running of the operation and to prepare a list of attendance to be attached to the pre-invoicing report.

The contractor shall avoid over- or underestimating catering numbers and keep flexibility vis-à-vis the supplier until the agreed cut-off date. Cedefop will communicate in writing via email to the contractor 5-7 days before the event date the final expected number of participants so that the quantity of the requested services/goods can be adapted on time and invoiced accordingly (after final real-time verification). If a minimum guarantee is asked for by the suppliers, this shall clearly be indicated in the budget proposal. The contractor shall envisage a practical system to ensure catering costs accounting. See also Annex L.

3. Communication with participants

All official communication and correspondence with participants shall be agreed by the contractor with Cedefop and bear Cedefop's corporate identity.

Correspondence with the participants shall normally be by e-mail and documents sent in pdf format, unless otherwise agreed. The professional conference organiser is responsible for ensuring that the communication sent on behalf of Cedefop is actually received by recipients.

The contractor may be requested to set up a specific event e-mail address and to provide an event telephone line.

Occasionally, written communication with participants of events involving more than one official language may need to be translated (invitation letters, official documents, registration forms, practical information).

a. Pre-event activities

Mailing of the invitation package

The standard invitation package includes at least:

- Invitation letter and annexes, if any
- Event agenda
- Registration form

Cedefop's event owner will provide the contractor with:

- the list of invitees in excel format (see point 4 *Database of invitees and list of participants*)
- the draft agenda
- the invitation letter template
- data protection disclaimer
- any administrative and practical information needed for the event.

The mailing of the invitation package shall be done by the contractor **within two working days** upon receipt of the above documents from Cedefop. It includes:

- *Invitation letter:* it shall be personalised according to the type of invitee (speaker, delegate, self-paying guest).
- *Agenda of the event:* the draft agenda of the event is often a Word document, especially at the first stage of the organisation of an event. The professional conference organiser shall ensure that professional graphic solutions are available to improve its visual quality (to be agreed with Cedefop).
- *Registration form (preferably on-line registration system).*

The contractor shall prepare the registration form upon the event owner's request and submit it to the event owner for approval before the mailing of the invitation package. The content of the registration form/tool is to be agreed with the Cedefop event organiser in accordance with the needs of every particular event (in either case a printed version of the registration form should be made available if needed).

Registration and communication before the event

The contractor shall be responsible for comprehensive assistance to participants and direct communication with them as regards all logistic matters (hotel reservation/confirmation, travel arrangement matters, administrative procedures such as insurance, reimbursements, transfers etc.).

In many cases, the contractor is the invitees' first contact prior to a Cedefop event and it falls to the

contractor's staff to convey a positive first impression. All written and oral communication shall be courteous in tone and correct in content.

The registration and communication process must be quick and efficient. All individual cases and requests must be handled in a quick and courteous way. E-mail requests shall be answered, or at least acknowledged, on the same working day. Urgent e-mail requests shall be dealt with without delay.

The contractor shall

- acknowledge participants' registration of participation **within 1 working day** from receipt of the registration. The acknowledgement must be personalised.
- confirm participants' participation **within 2 working days** from receipt of registration.
- follow-up with the participants on their practical arrangements **within 2 working days** from receipt of registration.
- upon agreement on individual practical arrangements, send final personalised confirmation **within 1 working day**.

The contractor shall accurately follow up with participants **by e-mail and phone** to ensure that they received the invitation package or any other event related documents (provided by Cedefop). The contractor shall also follow up with participants who did not reply to the first announcement with a maximum of two phone recalls. In relation to this, the contractor shall prepare a report which will be sent to Cedefop for further action.

The contractor shall ensure a rational and timely finalisation of practical arrangements with participants. In case of any delay the contractor shall undertake corrective action, if necessary, informing the Cedefop event owner.

The contractor shall regularly update Cedefop on progress of registration (see also points 4b and c below).

Registration form

The registration form shall contain relevant administrative and practical information and clearly indicate, among others, what is covered by Cedefop in terms of accommodation, meals and other expenses. The contractor's registration system can either be online (preferred option) or manual (by means of an electronic system - files of appropriate format such as doc, pdf etc).

Registration can be done using an online tool where participants self-register themselves and their data are stored in an underlying database on the contractor's platform. The online tool should provide both for an automatic acknowledgement receipt following participant's registration and for the participant to view and update his/her personal details.

The platform should provide for full real time reporting and exporting of participants' registrations and transactions. Data shall be made available to Cedefop if requested.

The registration form must be clear and user-friendly and include the following:

- personal data of the participant: gender, title, first name, family name, company/institution, department/service, job title, complete address (fields: street and number, country code, post code, town, country phone, fax, e-mail, Facebook and Twitter account, if any)

- logistical information about the participant's registration: attendance of sessions or workshops, social event, lunches/dinners (including any special requirements), hotel confirmations (including any special requirements), travel and flight details

- logistical information for the participant: information on the conference site, full hotel details (name, address, fax, tel. numbers, possibly a link to their website), check-in and check-out time, indication of hotel rates for self-funding and non-self-funding guests, the maximum number of nights covered for Cedefop guests, what is covered or not covered by Cedefop in terms of accommodation, meals and other expenses, deadline for registration

- additional information such as registration/welcome desk opening times, instructions for pick up at the airport upon arrival or for public transport, facilities for persons with disabilities, official documents required (if any), local information (language, currency and exchange facilities, plug type, climate, clothing etc.), a map showing how to get to Cedefop and other event related venues.
- disclaimers related to the privacy protection issues (notification to all registered participants that their data will be handled in full compliance with data protection Regulation EC 45/2001 and request of consent to include their data in Cedefop's contact database.). Prior to the event, participants will be informed on the audio-visual coverage of the event (for example, pictures, video and webstreaming, filming) and requested to give their consent to being filmed/photographed.
- Cedefop's *Rules concerning the reimbursement of travel, subsistence and miscellaneous expenses of experts from outside Cedefop invited to meetings* (hereafter referred to as *Rules for the reimbursement of expenses* (see Annex B) and other Cedefop guidelines (if applicable).

If participants agree, Cedefop will export their personal details to its contact database in order to send them publications and/or invite them to future events.

Nota bene: When a dedicated event website is set up, the major part of the above information will be made available to participants via the website and does not need to be included in the invitation package.

b. Post-event activities

Thank you letters
Following an event, the contractor shall send 'thank you' letters to relevant recipients (speakers, facilitators, audience etc.), if requested, and take care of circulating the event documentation, hand-outs or proceedings to all delegates (or, alternatively, upload these to the event website).

Final list of participants
The contractor shall deliver the final list of registered participants to the event owner, indicating any changes in participants' contact details.

4. Database of invitees and list of participants

For any individual assignment including the service *Communication with participants*, the Cedefop event owner will provide the contractor with a provisional list of invitees in **excel format** and all relevant documents/templates. On the basis of this information, the contractor will be responsible for managing the following:

a. Database of invitees

The database of invitees shall be managed as follows:

- Entry of personal data upon receipt of registration forms from participants.
- Notification of any changes to participants' personal data to the Cedefop event owner.
- Day-to-day management and, whenever needed, production of up-to-date registration reports (see also point b below).
- Notification to all registered participants that their data will be handled in full compliance with data protection regulation EC 45/2001[3] and request of consent to include their data in Cedefop's contact database.

The contractor should envisage, in cooperation with Cedefop, a user-friendly online system that provides real-time updates of participants' data (see also point b just below).

b. Registration reports

During the preparation of an event, the contractor shall provide the Cedefop event owner with regular and accurate registration reports in Excel format, in principle once a week, starting from the mailing of the invitation. An ad hoc timetable should be agreed for any given event with the Cedefop event owner. The contractor shall be able to produce up-to-the-minute registration reports at short notice.
The registration reports shall include the following:

- personal details
- category of invitees
- attendance of sessions and/or social events
- travel schedule (date and time of arrival and departure, flight numbers)
- hotel assignment
- remarks (any other information about a participant, e.g. linguistic or dietary requirements)
- travel cost type (prepaid, reimbursable, non-reimbursable) and cost
- any other information requested by Cedefop.

The registration reports shall allow for multiple sorting (by any type of information: name, country, category of invitee, hotel, attendance of sessions or social event, etc.). The contractor should be able to produce different reports according to Cedefop's request (e.g. on accommodation, transfer, arrival, participants' category, etc.).

Following an event, the contractor shall provide the Cedefop event owner with final registration statistics based on the final list of participants, including cancellations or replacements, dates and times of arrivals and departures, numbers of nights of accommodation, cost of travel arrangements, other costs if any, catering and social activities attendance, and other details.

Additionally, the contractor shall deliver a final list of participants to Cedefop's contact database manager, using a special excel template prepared for importing data into the contacts database.

The contractor should envisage, in cooperation with Cedefop, putting in place a user-friendly system for the interfacing and smooth communication and management of invitees/participants data. If technically feasible, the contractor should provide Cedefop with remote access (username

[3] http://ec.europa.eu/justice/policies/privacy/docs/application/286_en.pdf

and password) to the database of invitees and the real-time registration.

c. List of participants

This task foresees the production and printing of the list of participants in a presentable Word or Excel format to be distributed at the event. The list of participants must be accurate and up-to-date, and delivered in a professional format. The Cedefop audience is multilingual and particular attention must be paid to the accuracy of personal data (including titles and the spelling of names). Before final production, the list shall be approved by Cedefop. Cedefop may request small changes to the list up to one day before an event.

- Update list of participants at the event or shortly before the event, if needed (e.g. no-show, data change notification etc.) and ensure distribution of *addendum*.
- Production of a final post-event list of participants to be delivered to Cedefop.

d. List of participants' signatures

- The contractor shall be responsible for collecting the list of actual participants' signatures to be used as the supporting document for the eligibility for reimbursement of costs. A list of participants' signatures shall be produced for every event day, either by Cedefop staff (in case of events without contractor's on-site staff) or by the contractor's on-site staff. It shall be based on the most updated registration report and include the names of all the people registered to the event, not only those entitled to reimbursement. This list shall be in line with Cedefop's template which will be provided to the contractor.
- The list of participants' signatures may differ from the list of participants described in point c above, which is only for communication purposes (e.g. not all participants may be eligible for reimbursement of expenses on the basis of Cedefop's rules for the reimbursement of expenses, Annex B).
- For large events, two separate lists, one for external participants and the other for Cedefop staff can be used to facilitate the registration process.

5. Documents and conference materials

In cooperation with Cedefop, the contractor shall ensure that the requested event documents and other material are made available to participants, including interpreters and Cedefop staff.
Documents shall be provided in a professional format (either printed or for online viewing).

In preparation of a Cedefop event, some or all of the following tasks may be required:

- Preparation of a welcome information kit (to be delivered to participants at the hotel upon arrival), including both local information (tourist information, town map) and practical information regarding the event (transfers, social programme, etc.).
- Preparation of conference kit (to be delivered to participants upon registration on site). The original document templates, including agenda, list of participants, event concept note, event evaluation form, reimbursement form (if applicable), (besides block-notes, pens and USB sticks) are supplied by the Cedefop event owner via email within a pre-defined deadline.
- The contractor will print the conference documents in the required numbers and supplement the kits with notepads and pens and, if necessary, with other information (relating to transfers, social programme, etc.), and make them available to all participants, including interpreters and Cedefop staff, in the required languages.
- In most cases, the first printing option will be digital printing in standard format (usually A4), double-sided and in colour. Cedefop's event owner may ask however for the agenda to be

printed on higher quality papier in A3 format to be folded. Offset printing may be required in some cases which will be specified in the event order form.

- Preparation and printing of name badges and name plates bearing the name of participant, Cedefop and/or event logo and possibly organisation and/or country of participant. A back-up system to produce professional looking replacement badges on site, in case of late substitutions or spelling mistakes, should be foreseen. Badges must be simple and should have a clip (to be fixed without damaging clothing - no pins). Name plates must be printed recto-verso and be readable from a distance.

- If applicable, preparation of information packages for various types of public (high profile delegates, speakers, press, etc.).

- Organisation of tickets and vouchers (for special events, meals, etc.) and production of invitations, mini programmes, seating arrangements, etc.

- For major events, design and production of bags, brochures/flyers and various gadgets (pens, pins, block notes, conference accessories etc.) with a dedicated graphic or logo may be required: for this, the contractor may be requested to submit an ad-hoc offer.

The contractor may be required to pick up material at Cedefop and to deliver/send it to the event venue.

In principle Cedefop will make folders, block notes, pens and USB sticks with its logo available for individual assignments. In case such Cedefop material cannot be made available, the contractor may be requested to provide alternative options.

All documents and material related to events (agenda, formal correspondence, concept note, handouts, event evaluation form etc.) must bear Cedefop's design and logo. For major events, a dedicated event logo may be required. The contractor shall apply Cedefop's visual identity system and logo application guidelines in order to ensure that Cedefop's identity is consistent on all written hard-copy and electronic communication (correspondence, agenda, folders, badges, nameplates etc.).

In case an event is jointly organised with other partners, more than one logo may be required on the event material. Cedefop will provide all logos and documentation on its visual identity to the contractor for each event.

Cedefop applies a green policy comprising *inter alia* the reduction of paper. Conference kits should reflect this environment-friendly attitude.

6. Event website

Cedefop may request the contractor to maintain a dedicated event website, uploading content provided by Cedefop. Such a website is created by Cedefop and hosted on Cedefop's web portal platform.
Examples of past event websites:

- http://www.cedefop.europa.eu/en/events-and-projects/events/MaxSkillsJobs2015
- http://www.cedefop.europa.eu/en/events-and-projects/events/cedefop-conference-impact-globalisation-vet-challenges-and-opportunities
- http://www.cedefop.europa.eu/en/events-and-projects/events/european-conference-engaging-smes-apprenticeship

Indicative sections and content of an event website:

Depending on the event, the event website can contain all or some of the following sections:

- Welcome page
- Content-related information (background information, agenda/programme and other documentation)
- Registration section
- Information on speakers (photos and short biographies of speakers).
- Map of venue and city
- Useful links related to the event venue (e.g. city tourist centre, airport, city hall, main museums and sightseeing); each link shall be presented together with a title, a brief description and the indication of the website language(s)
- Practical information page only for participants who are logged in
- Presentations shown during an event shall be made available for download next to the relevant title and timeslot of the agenda following the event (after permission of the author).
- Photo gallery

The contractor shall update the website with content provided by Cedefop within 24 hours (on working days) (create html web pages from provided texts, upload files, photo galleries, recorded video galleries, agendas, presentations, list of speakers, etc).
Cedefop uses the Drupal content management system (CMS). The professional conference organiser shall be requested to maintain website content using this CMS.

7. Facilitation/ moderation

The contractor may be requested to search and identify a meeting facilitator or meeting moderator. This person's role shall be defined according to the needs of each individual assignment and may comprise both event/meeting design and on-site facilitation/moderation. Close cooperation with Cedefop's event owner well ahead of the meeting is required.

His/her tasks may include:

- Support Cedefop's event owner in the design of a conference/event by advising him/her on an appropriate overall format, format of sessions, application of techniques conducive to interactivity and arrangement of rooms/furniture
- Inspire, steer and "set the style" of a meeting and guide participants through the meeting
- monitor the agenda and stick to time
- codify the purpose, scope, and deliverables of the meeting or workshop so that they are understood by all participants
- manage group dynamics
- be impartial and supportive of different points of view and foster solutions incorporating them
- facilitate structured thinking activities
- record agreements in such a way so that all participants can see and accept the wording

- use a variety of group facilitation and dialogue tools
- ask open-ended questions that stimulate thinking
- interview guests
- introduce panellists
- evaluate discussions ex-post to assist Cedefop in continuous improvement.

In its request for offers, Cedefop will inform the contractor on the maximum budget it is willing to make available. Cedefop and the contractor shall agree on the breakdown of the available budget into facilitator's/moderator's fee and costs for travel and accommodation.

8. Interpretation

The working language of Cedefop meetings is generally English. If indicated in the request for services, the contractor may be requested to provide one or more interpreters in accordance with the event requirements. Services may include:

- simultaneous interpretation (direct interpretation and not relay system, as a first option**),**
- consecutive interpretation
- whispering interpretation

Depending on the specifications of the request of services, all or some of the official languages of the European Union can be covered. In exceptional cases, the contractor may have to provide interpreters to cover non-EU languages.

As a guarantee of quality, interpreters must have membership of accredited international associations with certified standards. Where possible, local interpreters should be preferred and recruited. Cedefop reserves the right to check the interpreters' credentials.

If interpreters are not available locally, the contractor may call on interpreters based elsewhere.

The contractor shall inform interpreters of the content of the event and provide them with all necessary meeting documentation in advance of the event.

9. On-site secretariat

Under this task, the contractor will be responsible for the partial or full on-site secretariat of an event, comprising tasks which need to be done before, during and after the event. The contractor's project manager for a specific event will coordinate the activities on-site and be the main reference person for the Cedefop event owner. He/She will closely liaise, well in advance, with the Cedefop event owner and, if needed, the event officer on all aspects of the operations on-site to ensure a smooth running and implementation of logistic activities and services required for the event.

The contractor will liaise with Cedefop (event owner and event officer) to address any organisational or logistic problems and will keep Cedefop fully and promptly informed of any problems that have not been resolved.

For large/complex events, a briefing (on-site or via Skype) should be foreseen before the start of the event for all participating Cedefop and PCO staff to distribute tasks and to share information. This is to ensure that the contractor's staff assigned to an event is accurately briefed on all aspects of the event and of the facility, as well as on time schedules and task allocations, to be able to

handle queries and problems efficiently. The contractor shall send a short report on all discussed and agreed points to Cedefop's event owner.

On-site staff should be flexible, proactive, and responsive and prompt in the handling of operations.

On-site staff has to be at the meeting venue well in advance of the start of the meeting and after the end of the meeting to ensure smooth operation (see also point 2.10. of these terms of reference).

On-site staff must have an excellent command of English. Any other language is an asset. Between themselves, assistants working on a particular assignment should ideally cover both English and the language of the host country (in most cases Greek). They shall work in a team under the supervision of a coordinator. The same team shall be available throughout the whole event. An event dress code is required for Cedefop events and on-site assistants shall wear name badges. Service provider staff (drivers, technicians) should wear professional work attire.

The contact details of the on-site staff (name and mobile phone number) shall be made available in advance to the Cedefop event owner to facilitate coordination and handling of last minute changes.

The contractor shall provide to Cedefop the following number of on-site staff per event category:

1 on-site assistant: Event with **15-30** participants
2 on-site assistants: Event with **31-60** participants
3 on-site assistants: Event with **61-100** participants
4 on-site assistants: Event with **101-200** participants

a) Tasks

Welcome service

- Welcome desk able to work proficiently in English. It should be staffed throughout the event so as to be able to provide assistance to the participants.
- Assistance upon arrival, including for lost luggage

Venue and Registration desk set-up

- Setting up registration desks
- Meeting rooms and technical equipment
- Organisation of registration area, including display of office stationery, badges, nameplates, personal envelopes and conference bags for participants
- Assembly of conference bags/personal envelopes
- Preparation of luggage room/area
- Signage and signposts for conference rooms and posting of information (shuttle departure, taxis, etc.)
- Clearing of registration desks

Display areas set-up

- Transport/distribution of publications and material from the storage room to the display area
- Organising the display of Cedefop publications and promotional material

- Setup and dismantling of the Cedefop stand; retrieval and disposal of material after closure of event

Registration and assistance to participants at event venue

- Welcome
- Registration of participants
- Distribution of name badges, personal envelopes and conference kits
- Signature of the participants/attendance list on each day
- Confirmation of participant details and obtaining participants' agreement for the distribution of their contact details to the other participants of the conference for be being photographed and/or video filmed.
- Providing the participants with all relevant information and administrative forms needed for the reimbursement.
- Monitoring arrangements made by the participants themselves to check for non-compliance with the rules (for example, business ticket or out of the standard route schedule)
- Handling of reimbursement formalities (collecting and photocopying reimbursement forms of participants on the basis of Cedefop's Rules for Participants' Expenses Reimbursement)
- Verification of reimbursement forms and accompanying documents to ensure that those are correct and completed according to Cedefop's rules for the reimbursement of expenses in annex B.
- Collecting all necessary administrative and supporting documents, including bank details and list attendance signatures, on-site at the event.
- Following up of individual cases where the documentation is not appropriate or incomplete.
- Submission of a complete reimbursement folder including all needed documents to the Cedefop event owner **within 2 weeks following the end of the event.**
- Helping speakers handle technical details in connection with their speech (IT assistance, distribution of hand-outs etc.)
- Managing a petty cash system for unforeseen petty expenditure during the event
- Accompanying participants (e.g. from entrance to conference venue)
- Management of cloakrooms and stored luggage
- Help desk during the event
- Provision of certificates of attendance as necessary
- Assisting participants with ad-hoc requests (printing of documents, boarding passes..)
- Distributing and collecting participants' event evaluation questionnaires
- Help call participants to conference session with bell (e.g. at the end of coffee breaks)
- Assistance with departures

<u>Registration process</u>

The contractor shall ensure that the necessary resources (staff, all necessary signage lists, infrastructure, equipment and software) are available to guarantee a swift, smooth and efficient on-site registration process. Furthermore, the registration procedure must be organised in such a way as to take into account the handling of reimbursements for some participants.

The registration processing system may be electronic and/or manual, depending on the size of the event. Electronic systems however should also foresee a manual backup. A description of on-site software used, if any, shall be provided in the tender presentation.

For large events, a sufficient number of desks for on-site registration shall be set up in order to ensure the swift running of operations covering for the different groups (for example: delegates, speakers, press, Cedefop staff).

Assistance in conference room

- Opening, closing, reception of participants, light control, A/V control, etc.
- Distribution of documents to interpreters
- Assisting speakers with IT presentations, distribution of hand-outs, etc.
- Verification/change of nameplates after each session
- Enforcing compliance with existing rules (e.g. no food and drinks allowed in Cedefop conference rooms)
- Distribution of head sets
- Handling/Circulation of wireless microphones during *Question & Answer* sessions

Closure operations

- Assistance to participants with departure
- Monitoring participants' departure
- Clearing up of reception desk and display area
- Verify that suppliers leave a cleared space
- Check with suppliers for invoicing
- Assistance to Cedefop's event owner (e.g. final briefings)

b) Secretariat facilities

The reception desk and/or secretariat area should allow for a smooth and orderly development of the tasks in progress, providing a sufficient and well organised space for staff, material and equipment.

In principle, reception/registration desks should be equipped with:

- PCs and software (Microsoft Office including Power Point/Excel/Word), Internet connection
- Printer(s)
- Telephone(s) and list of useful numbers available at hand
- Complete stationary (including paper for printer and bins)
- Multifunction photocopier
- A bell

In case of events outside Cedefop, the contractor shall ensure that a storage room and facilities for Cedefop staff to prepare work/briefings with speakers, facilitators etc. are available.

10. Photographic services

The contractor may be requested to provide an on-site photographer for Cedefop events.

The photographs should be of people (participants attending meetings, portraits, group photos etc.) and, if appropriate, features of the building where the event takes place.

In accordance with the relevant data protection rules and following the participants' agreement, these photographs may be used by Cedefop for its website, newsletter or publications. They may also be used, with the agreement of Cedefop and the concerned participants, by other interested parties. The copyright of the photographs produced by the contractor in the context of this contract belongs to Cedefop. A licence to use the copyright may be granted to the contractor upon request.

Photographs shall be provided in digital format (high resolution) and, if requested, in print format.

The photographer may also be asked to produce a slideshow with up to 6 pictures and sound from selected events (e.g. short interviews arranged by Cedefop), using the multimedia application Flash MX for uploading on the internet in the following formats: Flash Player, Quicktime and for Windows Projector.

A photographer's session is usually between 1 and 3 hours maximum (usually at the beginning of an event).

11. Protocol and security

The contractor should be aware of cultural diversity and rules of ceremony which might vary from one country to another. For ministerial level events, protocol and security should be carefully planned in advance, in consultation with Cedefop and, if necessary, with the governmental and local authorities involved. The same applies to possible attendance of EU Commissioners. Arrangements may cover:

- welcome at the airport
- decorations, such as flowers at the speakers' table
- flags (in principle, in alphabetical order in English)
- interpretation, as necessary (i.e. beyond the official languages of the conference)
- seating arrangements at the conference (priority, head of table, reserved first row, etc.)
- seating arrangement at social event
- social invitation to authorities
- private meeting rooms for bilateral meetings.

Protocol arrangements concern maximum two persons in an event, i.e. Minister of a foreign country or European Commissioner plus a Greek Minister.

Only the host country authorities can take responsibility and be accountable for security matters. However, the contractor must be aware of potential risks in the case of sensitive events or attendance and should liaise with Cedefop's security officer and the government authorities regarding the security arrangements that need to be made and their implications for the organisation of the event.

12. Special programme and entertainment

The contractor's know-how and creativity in designing a special programme to enrich the event schedule and to enhance social interaction among participants may be requested, as the ability to link this with the event content message while reflecting Cedefop's mission (in agreement with Cedefop).

The contractor may be requested to arrange:

- gala event (table plan, participants list, place of names for tables, including seating chart for participants direction, welcome/opening reception, dinner time speakers);
- cultural visits and events, guided and sightseeing tours;
- organisation of entertainment (music, theatre performance, etc.), including authorisation and licensing paperwork;
- programme for spouses/accompanying persons;
- typical local evening;
- tourist information provision.

The contractor may be requested to submit up to three proposals for each of these services to the Cedefop event officer.

Information on a social invitation should comprise:

- the name of the host/inviter
- date
- location and address
- map, if necessary
- colour code, if there are seating areas
- meeting place, if there is transportation
- dress code
- RSVP

The details of the special programme should be indicated from the outset. The contractor shall assure the presence of the necessary staff from the start to the end (from arrival to departure of participants) providing this service for the smooth running of the operation.

These services may be included in an event or requested separately.

13. Technology support services and equipment

If the room(s) in which the event(s) take place is/are not appropriately equipped, based on the request of services, the contractor shall ensure the supply of up-to-date technology support services, complying with current European standards and of equipment (for example: audio visual, IT/internet, technical equipment, simultaneous interpretation infrastructure, technical assistance), in view of a smooth and effective running of the event. In this context, the contractor must manage the supply and installation of the needed equipment and ensure high-quality technical support on site, throughout the duration of the event. This may typically include one or more of the services listed below (non-exhaustive):

- **Audio and video equipment**: full sound system and microphones with receiver sets (table, clip-on, wireless), audio speakers, overhead projector, screens and monitors, video conference facilities (high resolution video projection and beamer), recording and transcribing of the debate (floor)
- **IT equipment**: computers (PC/laptops and up-to-date software, Microsoft Office with Powerpoint/Excel/Word) , printers, Wi-Fi connection, streaming facilities (live and webcast) possibly embedded in the conference website, plasma screen 42'or more, connectable to a PC or media player, media player including DVD, connection to social media (TweetWall)
- **Technical equipment**: black and white photocopier, printer (laser printer, black and white and colour printer), telephone lines and telephones/mobiles.
- **Simultaneous interpretation infrastructure**: mobile interpretation booths[4] according to ISO 4043-1998 and related material, receiver sets for each participants including headphones (transportation, installation and operation by experienced technicians).
- **Technical assistance**: may include, depending on the venue, full-time assistance by ICT& audio visual technicians from the preparatory stage (setting up of conference room and/or reception desk equipment) to the end of the event. For all technical equipment, back-up equipment for the whole duration of the event shall be foreseen (with no additional cost).
- Non-IT equipment such as flipcharts and markers, high stools, armchairs and coffee tables can be requested from the contractor if not provided by venue (e.g. hotel).

Web and ICT related services

The Cedefop event owner shall indicate the type of web and ICT related services needed on the basis of the following table.

Type of service	Description of technical service requested	Code of Service
Video-Conference and Teleconference Services	Multipoint Control Units (MCU) and bridging services. To connect more than two video locations using multipoint bridging technologies, media servers and equipment that enable group video conferencing and collaboration. In addition, a variety of software-based and hardware-based MCU products to ensure the right fit for any conference-meeting environment.	V1
	Video Conferencing Bridging for IP-to-ISDN Gateway Services. To connect IP and ISDN sites in the same meeting - both point-to-point and multi-point.	V2
	Audio Conferencing Services. To provide high-quality Audio Conferencing including the dialling in/out of all participant(s). For dial-in conferences a password protection to prevent unauthorized access should be provided.	A1
Streaming Services of Video / Audio	Real Time Services using RTMP (Real Time Messaging Protocol), live-streaming. In conjunction with the video-conference services it is possible to request the live streaming of an event during the actual time of the event.	S1
	Recording of an even for "on demand" streaming of a conference using RTMP (Real Time Messaging Protocol)	S2
Technical Assistance	Video-conference Audio-engineer as a Network Consultant/Engineer to provide on-site support	T1
	Video-conference Audio-engineer as a Network Consultant/Engineer to provide remote support	T2

The contractor shall be responsible for providing the categories of services as described in the above table. These services shall be set up and delivered with excellent video and sound quality and shall be inclusive of all required staff, equipment, infrastructure, communication means and

[4] Mobile interpretation booths according to ISO 4043-1998 (http://ec.europa.eu/dgs/scic/docs/organisation/en_2016.pdf).

media, and testing of connectivity. [5]

14. Transfers and on-site transportation

At Cedefop's request, the contractor shall take care of the overall organisation of transportation services for the event, including:

- detailed plan of arrivals and departures
- maintenance of a transport list for arrivals and departures and provision of an accurate and updated list to the transport company
- staff at the airport, if required, including assistance for lost luggage
- shuttle service to and from the airport/hotels/conference venue/restaurant, including staff to provide full assistance
- transport for cultural programme
- effective communication with all cars/buses in real time
- review of invoices from transport suppliers (in particular cross checking transfer times against the logistics of the event list, to ensure that it fits with the financial agreement and the actual transfers carried out).

Full assistance from the contractor, including phone availability, shall be ensured **for the entire period** in which participants are travelling, to be able to monitor arrival and departure and modify local transfer services as needed, in case of last minute changes (flight delays and cancellations etc.).

The transportation services must be performed in compliance with national legislation and with the relevant European directives.

Where applicable and as a first option, the contractor should negotiate with the recommended hotels whether free bus service is offered between the hotel and the conference / dinner venue, according to the conference needs.

15. Venue

In case of activities outside Cedefop's premises, the contractor may be required to identify venues that offer the best facilities to Cedefop's event requirements. The contractor shall be responsible for:

- conducting a search of a suitable venue based on the event objectives, format, budget, accommodation and other relevant requirements specified by Cedefop's event owner
- submitting up to three offers to Cedefop with a description of the main features of the venues proposed (for example, floor plans and set up plans of the proposed venues adapted to the

[5] The contractor may be requested to provide any of the services mentioned above for video-conference, audio-conference, streaming services in conjunction with technical assistance according to the technical specifications below:
- Video conferencing shall be possible using both H.320 (ISDN) and H.323 (IP) connections and should support calls up to 384 Kbps. over ISDN and speeds up to 1024 Kbps. over IP.
- Streaming shall be possible as Adaptive Streaming with Hi-Resolution MP4 format

The contractor will be required to provide the necessary computer hardware, internet connection (with adequate bandwidth), cameras, capture cards, RTMP encoder, etc.
RTMP Live Encoders: The encoders should be able to broadcast out using H.264 or VP6 as their video codec. MP3, M4A and AAC can be used for the audio format when streaming.

event requirements), including a rationale for decision
- when necessary, organising on-site inspections, with or without the Cedefop event owner. The findings of the site inspections will be shared in writing with the event owner
- reserving and, if necessary, renting the appropriate venue.

An indicative checklist of items to be specially considered is as follows:

- access and registration
- audio-visual and technical equipment (video projector, microphones, including the possibility for simultaneous interpretation if necessary)
- configuration and location of reception, catering, display areas and other facilities (cloakrooms, lavatories, leisure)
- insurance and safety issues
- internet points/wireless connection
- lighting
- security (access)
- signposting and direction facilities
- signs and room decoration
- support services (office services, secure storage room, press room, telephone lines, printing/photocopying equipment, car parking, coach access etc.)

2.4. Reports

After each event, PCO activities are being evaluated, including a self-assessment of the overall event organisation by the PCO and a debriefing (all in English) with Cedefop's event owner. These regular reports are instrumental to the sharing of good practices and to capacity building between Cedefop and the professional conference organiser's team. This feedback and assessment process – and possible follow-up action – is coordinated by Cedefop's event officer (conference service).

2.5. Meeting and travel expenses

The Contractor will be requested to attend an inception meeting following the signature of the contract. This meeting will take place in Cedefop's premises in Thessaloniki. Travel and accommodation costs incurred by the contractor to attend this meeting shall be reimbursed.

All costs that may occur in performing the contract, including travel and accommodation expenses for PCO staff to Thessaloniki, Brussels or any other EU country, shall be covered by the contractor.

2.6. Social Security contributions and compliance with labour law

The contractor has the obligation:

a) to comply with the labour laws, such as the legislation referring to the payment of the employees' salaries in line with the respective employment contract, as well as the collective agreements of the Member State where the contractor is established

and

b) to fulfil obligations relating to the payment of social security contributions of their personnel assigned to Cedefop in accordance with the legal provisions of the country in which they are established or those of Greece.

In case of non-fulfilment of these legal requirements, the Contracting Authority will consider relevant measures, as set out in the Framework Service Contract, such as the termination of the contract.

Cedefop reserves the right to check any documentation describing the above mentioned requirement throughout the whole duration of the contract.

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. He must in that case prove to the contracting authority that he will have at his 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 **200,000 €**.

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 sub-contractors (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 sub-contractor) is unable to provide one or other of the above documents, they will be required to justify the non-provision and may prove his 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.

They must demonstrate qualifications, knowledge, skills and the ability to perform the tasks outlined in the terms of reference (only for studies).

Requirements for Technical and professional capacity:

- Enrolment in the relevant professional register;
- Adequate technical and human office infrastructure in order to perform the services described in the Terms of Reference;
- Over the past three (3) years, the tenderer must have performed per year at least 1 event with more than 100 participants and 2 events with 50 to 80 participants comprising the same kind of services as those required in this call for tenders. For the organisation of these three yearly events as a whole, the tenderer must have performed at least services 1,2,3,4,5,6,9,12,13 and 14. In addition, at least 1 event out of the three must have taken place in a country other than that where the tenderer has his seat.
- The Tenderer's team, who will be proposed for the implementation of the contract, must be composed of **3** team members (1 project leader and 2 project managers) **and 1** back-up project manager. Their profiles, knowledge and experience must be relevant to the subject of the contract for its successful implementation (see also point 2.3). In particular:
    - The team leader must have at least five (5) years of experience in leading a team providing Professional Conference Organiser services. He/she must also possess an excellent working knowledge of English (at least C1).

- Each of the 3 project managers must have at least three (3) years of experience in providing Professional Conference Organiser services. Each project manager must also possess an excellent working knowledge of English (at least C1).

Proof / Evidence 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;
- Brief company profile **(please fill-in Annex G – Questionnaire 4)** including a description of premises from which the Professional Conference Organiser will operate, their office equipment, IT software infrastructure in use and communication facilities. It should also include the number of staff proposed to implement the contract;
- List of major events performed in the past **three (3)** years describing the contracting authorities, the number of participants, the dates, the percentage and the specific services provided by the tenderer **(please fill-in Annex G – Questionnaire 3)**; in case of subcontracting, the tenderer must indicate also the exact percentage of the work carried out;
- The CVs of the team proposed for the implementation of the contract (project managers and their team leader) including professional experience and language abilities. The Tenderer may use the Europass format.

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 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) <u>altogether</u> 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:

Total Score (TS) = X*(TQV/100) + Y*(Cheapest TFO / 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 **(70);**

Y is the weighting for price (TFO) and for this tender procedure it is fixed to **(30).**

Cheapest TFO is the Cheapest Tender Price of a technically compliant tender (i.e. among those having achieved a minimum of 50% of the possible score for the 3 award (evaluation) criteria and in total a minimum of **65** 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 will be applied to this tender procedure:

No	Award criterion	Max points	Supporting documentation /information to be provided in the technical proposal
1	**LEVEL OF UNDERSTANDING OF THE SERVICES REQUESTED**	**35**	Description of how the required services will be optimally carried out in Greece and in Brussels in terms of speed of action, resourcefulness and flexibility: overall management of the contract, effective communication with Cedefop, quality assurance, identification of main challenges and of likely difficulties in carrying out the work and proposed actions to ensure continuity of service, environmentally sustainable practices. Maximum 3 pages.
1.1	Overall management of the contract, communication with Cedefop and quality assurance	20	
1.2	Risk assessment (challenges, likely difficulties and proposed solutions)	15	

2	**QUALITY OF A SCENARIO ANALYSIS**	**40**	Tenderers are required to make proposals for the implementation of four hypothetical events described in annex M. For each of these events, tenderers shall provide a description and timing of the various actions they will undertake to organise each one of these events (pre-, during and post-event). The number and type of units (e.g. half-day, full day, number of staff etc.) assigned to the implementation of the different tasks should be specified, and examples of correspondence (e.g. invitation letter, confirmation of attendance) included. Tenderers should display a certain originality of approach, striking a balance between innovation and existing options. Maximum 10 pages for the four events, excluding examples of correspondence.
2.1	Appropriateness of the time schedule proposed	20	
2.2	Relevance of the actions taken in relation to the required tasks	20	
3	**ORGANISATION AND MANAGEMENT OF HUMAN RESOURCES**	**25**	Description of the composition and organisation of the tenderer's own team dedicated to Cedefop (division of work and roles of each team member, back-up arrangements as well as coordination and supervision of all persons). Description of how the tenderer will mobilise a network of service providers and how he will address possible shortcomings of these local service providers to ensure continuity of service. Maximum 2 pages.
3.1	Team organisation and roles, division of work	15	
3.2	Work coordination including outsourcing and supervision of team and other providers	10	
Overall total score (total quality value – TQV)		**100**	

In order to guarantee a minimum threshold of quality, offers that

- do not reach a minimum of 50% of the possible score for the 3 award (evaluation) criteria and
- obtain an overall total score (Total Quality value) of less than the total **65** (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.

It is up to the tenderer to present in his Technical Proposal a detailed organisation and methodology such that they fulfil (comply in full with) all requirements outlined in the Terms of Reference.

For the technical evaluation of the offer against the award (technical) criteria mentioned above, the tenderer must provide supporting documentation /information as stated in the table 1 above under point 5.1.

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.

The tenderer shall identify a Project Manager within his organisation who will represent the single contact point for all administrative and operational communication in regards to the contract implementation. As appropriate, the Team leader (see 3.2.2.) can also act as Project Manager or two different persons can be identified. Cedefop will also designate the Contact Person in charge of handling the contact with the selected tenderer.

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.

5.3. Financial evaluation

Only tenders scoring in total **65** points or more (of a maximum of 100 points) against the technical award criteria and 50% or more of the possible maximum score for each award criterion will be admitted to the subsequent evaluation stages. The evaluation will be made on the basis of the Grand Total Specimen quotation (TFO) offered in Annex H1 (see point 5.4). This total price is an automatically calculated figure, based on various prices inserted by the tenderer in the yellow cells displayed in the "Financial Offer PCO" and will serve for evaluation purposes only.

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 prices quoted must be fixed and not revisable for the first year of the contract. From the 2nd year onwards, Articles I.5.2 and II.20 of the Contract shall apply (see draft Framework Contract at Annex B).

- 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)".]

5.3.1. **Evaluation of abnormally low prices**

If any tender's price appears to be abnormally low in relation to the *services / supplies* offered, and in order to check if the tender can be considered valid, the evaluation committee will, before it may reject this tender, send a request for clarifications to ask for explanations on the components of the tender which it considers relevant to the presumed abnormally low price and shall verify those constituent elements taking account of the explanations received. If in that relation the tenderer cannot explain his price on the basis of the economy of the services or supplies offered, or the method used, or the technical solution chosen, or the exceptionally favourable conditions available to the tenderer, the tender will be rejected.

A price will be considered abnormally low if the financial offer of any tenderer is lower with more than the acceptable margin of deviation from the average price of the other technically acceptable offers (please note that definition of which offers are technically acceptable/ compliant is given in points **5, 5.1** and **5.3** above). The actual deviation will be calculated as % as follows:

The difference between the average price of the other technically acceptable offers *and the value* of the presumably abnormally low financial offer *will be divided by the average price* of the other technically acceptable offers.

The acceptable margin of deviation is set to **40%.**

The approach of the Evaluation Committee to identify and eliminate abnormally low tenders will be the following:

a) apply the acceptable margin of deviation from the average price of the other technically acceptable offers and set aside the offers that go beyond it;

b) check if specific notes or specific items included in the offer justify to some extent the deviation; if not, or if inadequate, send relevant request for explanation(s) to the tenderer concerned;

c) decide on the acceptability of the offer on the basis of the notes in the tender and/or the clarification reply received.

5.3.2. Financially unacceptable tenders

In the context of financial evaluation, the Evaluation Committee could find that tenders are unacceptable because the price is abnormally low (see point 5.3.1);
Such tenders will have to be rejected by the Evaluation Committee, independently of their quality value as determined in the preceding (technical) evaluation stage.

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 scenario must be clear and in compliance with the tender specifications (See instructions in annex H2).

The Financial Scenario should indicate the total price in order to carry out all the activities indicated in the Terms of Reference. The tenderers must fill-in all yellow cells of the “Financial Offer PCO” attached in Annex H1 and present a detailed breakdown of the price offered.
The figures inserted by the tenderers will serve as data in order to have the totals requested in the Grand Total Specimen quotation (based also in Specimen quotations Event 1, Event 2, Event 3, Event 4) automatically calculated. The tenderers should take into account for the establishing of their prices this Specimen quotation which corresponds to a hypothetic but realistic annual volume of required services. This annual volume is however indicative and therefore not binding to Cedefop in case of future orders and will serve for evaluation purposes only.

Any missing figure in the requested fields of the “Financial offer PCO” will lead to rejection of the offer.

The Financial Scenario should clearly match the Terms of Reference and the estimate of value. All services that shall be procured should be included.

The tenderers are requested to submit and include in their tender the Annex H1 (all sheets) in a signed print-out form. Any missing sheet will lead to rejection of the offer.

The Financial Offers will be checked for any arithmetical errors in computation and summation. Errors will be corrected by the evaluation committee as follows:

- where there is a discrepancy between a unit price and the total amount derived from the multiplication of the unit price and the quantity, the unit price as quoted will be the price taken into account *(not applicable for global price contract).* Tenderers will be requested to confirm in writing the corrected calculation so that it may eventually be included in the contract.

Please note that Cedefop estimates for quantities are indicative and do not constitute any kind of legal obligation for the Centre.

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 – 6 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 (Annex H1) 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**	
Envelope **'A'** must contain 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	☐	☐	
Envelope **'B'** must contain one original and three copies of:	6.2	☐	☐	
- the technical proposal	2, 5.2, 6.2	☐	☐	
Envelope **'C'** must contain one original and three copies of:	6.3	☐	☐	
- the Financial Proposal	5.4, 6.3 & Annex H1	☐	☐	

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 - 6

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

ANNEX H1

Financial Proposal

(**Given as a separate Excel file)**

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

Cedefop events – facts and figures

ANNEX L

Operational and financial guidelines for Cedefop events

ANNEX M

Proposal for organisation of four hypothetical Cedefop events