



Specifications attached to the Invitation to Tender

10.CAP.OP.29

NEC Assessment Criteria and Methodology Study

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Introduction to EDA

The European Defence Agency, (hereinafter “EDA” or “the Agency”), was established under a Joint Action of the Council of Ministers on 12 July, 2004, "to support the Member States and the Council in their effort to improve European defence capabilities in the field of crisis management and to sustain the European Security and Defence Policy as it stands now and develops in the future".

Functions and tasks

The European Defence Agency, within the overall mission set out in the Joint Action, is ascribed four functions, covering:

- developing defence capabilities;
- promoting Defence Research and Technology (R&T);
- promoting armaments co-operation;
- creating a competitive European Defence Equipment Market and strengthening the European Defence, Technological and Industrial Base.

All these functions relate to improving Europe's defence performance, by promoting coherence. A more integrated approach to capability development will contribute to better-defined future requirements on which collaborations - in armaments or R&T or the operational domain - can be built. More collaboration will, in turn, provide opportunities for industrial restructuring and progress towards the continental-scale demand and market, which industry needs.

Further information can be found on the Agency's web site at <http://www.eda.europa.eu>

1 Overview of this tender

1.1 Description of the contract

The services required by EDA are described in the terms of reference in **Section 2** of the present Tender Specifications.

1.2 Timetable

Summary timetable	Date	Comments
Launch date	29 th September 2010	
Deadline for request of clarifications from EDA	04 th November 2010	
Site visit or clarification meeting (if any)	N/A	N/A
Last date on which clarifications are issued by EDA	09 th November 2010	
Deadline for submission of tenders	19 th November 2010	Not later than 11:00h Local Time
Opening session	22 nd November 2010 ¹	11:00h Local Time
Interviews	N/A	N/A
Completion date for evaluation of tenders	December 2010	Estimate
Signature of contract(s)	December 2010	Estimate

1.3 Participation in the tender procedure

Tenderers must not be in any of the exclusion criteria indicated in section 3.1 of these tender specifications and must have the legal capacity to allow them to participate in this tender procedure (see **Section 3.2**).

Please note that any attempt by a tenderer to obtain confidential information, enter into unlawful agreements with competitors or influence the evaluation committee or the EDA during the process of examining, clarifying, evaluating and comparing tenders will lead to the rejection of his tender and may result in administrative penalties.

1.4 Participation of consortia

Consortia, may submit a tender on condition that it complies with the rules of competition.

A consortium may be a permanent, legally-established grouping or a grouping which has been constituted informally for a specific tender procedure.

¹ Maximum one legal representative per participating tenderer may attend the opening session. Tenderers shall inform the Agency of their intention to attend, at least 5 days prior to the opening session.

Such grouping (or consortia) must specify the company or person heading the project (the leader) and must also submit a copy of the document authorising this company or person to submit a tender. All members of a consortium (i.e., the leader and all other members) are jointly and severally liable to the Contracting Authority.

In addition, each member of the consortium must provide the required evidence for the exclusion and selection criteria (see **Section 1.3.2** of these Tender Specifications). Concerning the selection criteria “technical and professional capacity”, the evidence provided by each member of the consortium will be checked to ensure that the consortium **as a whole** fulfils the criteria.

The participation of an ineligible person will result in the automatic exclusion of that person. In particular, if that ineligible person belongs to a consortium, the whole consortium will be excluded.

1.5 Sub-contracting

The tenderer must indicate clearly, which parts of the work will be sub-contracted.

Sub-contractors must satisfy the eligibility criteria applicable to the award of the contract. If the identity of the intended sub-contractor(s) is already known at the time of submitting the tender, all sub-contractors must provide the required evidence for the exclusion and selection criteria as detailed in **Section 3.2** of these tender specifications.

If the identity of the sub-contractor is not known at the time of submitting the tender, the tenderer who is awarded the contract will have to seek the EDA’s prior written authorisation before entering into a sub-contract.

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

1.6 Presentation of the tenders

The tenders must comply with the following conditions:

Tenders must be submitted in accordance with the **double envelope system**:

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

- the reference number of the invitation to tender <10.CAP.OP.29 >
- the project title **“NEC Assessment Criteria and Methodology Study”**
- the name of the Tenderer
- the indication **“Tender - Not to be opened by the internal mail service”**
- the address for submission of tenders (*as indicated in the letter of invitation to tender*)
- the date of posting (*if applicable*) should be legible on the outer envelope.

The outer envelope must contain **three inner envelopes**, namely, **Envelope A, B and C**.

The content of each of these three envelopes must be as follows:

Envelope A – Administrative documents

- the **Tender Submission Form** found in **Annex VII**
- the duly filled in, signed and dated **Exclusion Criteria Declaration(s)** as requested in section 3.1 and using the standard template in **Annex IV**
- the duly filled in, signed and dated **Legal Entity Form(s)** using the standard template in **Annex V**
- the duly filled in, signed and dated **Financial Identification Form**² using the template in **Annex VI**
- The **Economic & Financial Capacity** criteria documents as requested in **Section 3.2**.
- The **Technical & Professional Capacity** criteria documents as requested in **Section 3.2**.
- **Duly authorised signature**, i.e. an official document (e.g. statutes, power of attorney, notary statement, etc.) proving that the person who signs on behalf of the tenderer is duly authorised to do so
- In case of **consortia**, a duly signed and dated consortium statement by each of the consortium members specifying the company or person heading the project and authorised to submit a tender on behalf of the consortium.

Envelope B – Technical proposal

One signed original and 3 (three) photocopies of the technical proposal providing all information requested in **Section 2**.

² In case of consortia, only one Financial Identification Form for the whole consortium shall be submitted, nominating the bank account into which payments are to be made under the contract in the event that the respective tender is successful

Envelope C – Financial proposal

One signed original, 3 (three) photocopies and an **electronic version** of the financial proposal based on the format found in **Annex II**

The original tender must be marked “**ORIGINAL**”, and the copies signed in the same way as the original and marked “**COPY**”.

Tenders should be drafted in one of the official languages of the European Union, **preferably English**. Requested documents not available in English must be accompanied by an English courtesy translation. The contract shall be entered into in English.

It is extremely important that tenders be presented in the correct format and include all documents necessary to enable the evaluation committee to assess them. Failure to respect these requirements will constitute a formal error and may result in the rejection of the tender.

1.7 Period during which the tenders are binding

Period of validity of the tenders, during which tenderers may not modify the terms of their tenders in any respect is 120 days after the deadline for the submission of tenders. In exceptional cases, before the period of validity expires, the EDA may ask tenderers to extend the period for a specific number of days, which may not exceed 40.

The selected tenderer must maintain its tender for a further 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 validity period irrespective of the date of notification.

1.8 Contacts between the EDA and tenderers

Contacts between the EDA and tenderers are prohibited throughout the procedure save in exceptional circumstances and under the following conditions only:

A. Before the final date for submission of tenders:

- At the request of the tenderer, the EDA may provide additional information solely for the purpose of clarifying the nature of the contract. Any request for additional information must be made in writing by e-mail at procurement@eda.europa.eu or at the **Fax no.: +32 (0)2 504 2975** and should indicate the reference number and the title of the tender.
- Requests for additional information received after the deadline for request of clarifications from the EDA as specified in point 1.2 – *Timetable* will not be processed.
- The EDA may, on its own initiative, inform interested parties of any error, inaccuracy, omission or any other clerical error in the text of the call for tender.
- Any additional information including that referred to above will be published on the EDA's website. Please ensure that you visit regularly the site for updates.

B. After the opening of tenders:

If, after the tenders have been opened, some clarification is required in connection with a tender, or if obvious clerical errors in the submitted tender must be corrected, the EDA may contact the tenderer, although such contact may not lead to any alternation of the terms of the submitted tender.

1.9 Visits to EDA premises

No site visit/information meeting at EDA's premises is deemed necessary for this procedure.

1.10 Division into lots

This tender is not divided into lots. The tenderer must be in a position to be able to provide all the services requested.

1.11 Variants

In the absence of any such indication in the terms of reference your tender should not deviate from the services requested.

1.12 Scope for additional services

The EDA may, at its own discretion, extend the project in duration and/or scope subject to the availability of funding and to satisfactory performance by the Contractor.

1.13 Security standards

In the general implementation of its activities and for the processing of tendering procedures in particular, the EDA observes the Council's Security Regulations set out in Decision 2001/264/EC.

1.14 Contract provisions

In drawing up your tender, you should bear in mind the provisions of the draft contract (see **Annex I** to the present Tender Specifications). In particular, the draft contract indicates the method and the conditions for payments to the contractor.

2 Terms of Reference

The Terms of Reference will become part of the contract that may be awarded as a result of the tender.

2.1 Description of the general requirement

There is hardly any capability today, and even less in the future, which will not benefit from the attribute of being network enabled (NE). From this perspective and as one of the EDA 12 CDP priorities, NEC represents the environment which allows other capabilities to fully become NE.

As such NEC is supposed to provide design principles, implementation guidelines, assessment criteria/methodology and assessment tools required to design, implement and assess the degree of NEC compliancy of various capabilities.

Being part of a set of several closely related projects to be conducted by PT NEC, this study represents a first step towards the coherence within the design of capabilities which are NE. The whole set of projects, including this one, is in line with the statements of the NEC Vision and the recommendations (Decisive Conditions) of the NEC Roadmap.

This study and all other related projects will be done in close cooperation with the the EDA Capability Development Support Unit, which is responsible for the CDP.

Annex 1 contains considerations on NEC. Although they are still having the status of draft, they can be used for preparing the tender. It is forbidden their utilization or quotation in any other context than for preparing the current tenders.

The winner will be provided with updated NEC, capability development and other relevant documentation at the signature of the contract.

It should be noted that further references may be provided by EDA as they become available or as recommended by PT NEC, up to and including the moment of provision of the PT NEC comments on the Progress Report 3.

2.2 Description of the subject and scope of the contract

The study will be based on the NEC Concept and the findings of the NEC Implementation Study (Vision, Roadmap and Comprehensive Architecture). The study will address the following issues:

- Define the principles required for the “Network Enabled” attribute of various capabilities, both civil and military, in line with the People, Information and Technology domains
- Refine the initial NEC Maturity Model provided in the NEC Vision up to a fully-fledged, usable model
- Propose a full set of assessment criteria and a methodology for (civil and military) capabilities which are “Network Enabled”, based on a NEC Maturity Model
- Provide the technical specifications and a detailed cost estimate for the further development of set of NEC Assessment Tools to be used for assessing the degree of NEC compliancy of various capabilities, based on the NEC Principles, the NEC Maturity Model and the NEC Assessment Criteria (the tool itself is subject of a different PT NEC project)

The set of assessment criteria will refer to all three dimension of NEC (People, Information, Technology), addressing relevant questions. Some examples 1) How to find the essential information from information overflow these days, how the technical part can help? 2) What is the importance of networks (technical or social) when planning or becoming aware of the situation? 3) What could this look like from a military or civilian perspective?

All progress reports, starting from the first one, will contain information on all the points listed above in order to allow improvements of the subsequent Progress Reports through further analysis supported by additional relevant references and formal PT NEC guidance and review.

2.3 Use of the outcome

The NEC Assessment Criteria study outcome will be used by MS and EDA as **a reference** for further national and EU efforts in implementing NEC.

Various outcomes of the study will be used also to follow on **PT NEC projects**:

- The NEC principles will be used as input to the NEC Guidelines Study, to be launched by PT NEC in 2011 (practical recommendations to develop, in a consistent manner, capabilities which are Network Enabled)
- The NEC assessment criteria will be implemented in the set of the NEC Assessment Tools, to be launched by PT NEC in early 2012
- The technical specifications will be used for preparing the Invitation to Tender of the NEC Assessment Tools.
- In parallel, the NEC principles, the NEC Maturity Model, the NEC assessment criteria and, from 2011 onwards, the NEC Guidelines will all be cross checked and validated along the NE Air Transportation project (done in cooperation by PT EATF and PT NEC). However, PT NEC would seek to identify other areas within EDA to proof-test the respective findings as applied to the capabilities development.

2.4 Volume of the contract

The maximum budget for this contract is **150,000 EUR**. This budget includes travel and subsistence expenses.

2.5 Deliverables

Month	Deliverable	Comments
M1	Project Management Document	At the kick-off Meeting (Jan 2011) To include a refined draft outline of the report (as compared with the one provided during the tendering procedure)
M2	Progress Report 1	Estimated date to be delivered to EDA: 10 Feb 2011 Estimated date of presentation to PT NEC: 15-16 Feb 2011 Comments from PT NEC: mid March 2011
M5	Progress Report 2	Estimated date to be delivered to EDA: May 2011 Estimated date of presentation to PT NEC: May 2011 Comments from PT NEC: mid June 2011
M9	Progress Report 3	Estimated date to be delivered to EDA: Sep 2011 Estimated date of presentation to PT NEC: Sep-Oct 2011 Comments from PT NEC: Oct 2011
M12	Final Report	Estimated date to be delivered to EDA: Dec 2011 Estimated date of presentation to EDA or PT NEC: Dec 2011

2.6 Duration of the contract

The estimated contract duration is **12 months**. The precise end date will be established by both Parties by exchange of letters.

2.7 Place of delivery/execution

Deliverables shall be delivered at EDA premises in Brussels, Belgium. All meetings shall normally be held at EDA premises, unless otherwise agreed between the two parties.

2.8 Milestone payments

After issuance of a Delivery Certificate by the Agency and upon receipt by the Agency of the corresponding invoice, the Contractor has the right, under the hereinafter indicated conditions, to be paid for the instalment below which is set as a percentage of the overall Contract price in € VAT excluded.

A Delivery Certificate is not to be considered as full acceptance of the partial deliveries and does not have the effect of an Acceptance Certificate.

Milestone (Months)	Payment Key	Percentage of the overall Contract price
T0+3 months	After the delivery of Progress Report 1	20 %
T0+6 months	After the delivery of Progress Report 2	20 %
T0+10 months	After the delivery of Progress Report 3	20 %
T0+12 months	After the acceptance of Final Report	40 %

T0 = Contract signature date (Dec 2010)

2.9 Additional requirements

The outcome of the Study is not expected to be classified. However, the contractor should be able to handle references up to the level of "Confidentiel UE".

3 Exclusion and selection criteria

3.1 Exclusion criteria

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

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

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

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

Means of proof required

Tenderers, **including all consortium members and all sub-contractors where applicable**, shall provide a declaration on their honour (see model in **Annex IV**), duly signed and dated, stating that they are not in one of the situations referred to above.

Nota bene:

The tenderer to whom the contract is to be awarded (the Leader in case this is a consortium) shall provide, within 15 days following notification of award and preceding the signature of the contract, the following documentary proofs to confirm the declaration referred to above:

- For points a), b) and e) a recent extract from the judicial record or, failing that, an equivalent document recently issued by a judicial or administrative authority in the country of origin or provenance showing that those requirements are satisfied.
- For point d) a recent certificate issued by the competent authority of the State concerned.

Where the document or certificate referred to above is not issued in the country concerned, it may be replaced by a sworn or, failing that, a solemn statement made by the interested

party before a judicial or administrative authority, a notary or a qualified professional body in his country of origin or provenance.

This obligation will be waived in case such evidence has already been submitted to the Agency for the purposes of another procurement procedure and provided that the documents are not more than one year old starting from their issuing date and they are still valid.

3.2 Selection criteria

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

3.2.1 Legal capacity

Requirement

The tenderers, **including all consortium members and all sub-contractors where applicable**, are asked to prove that they are authorised to perform the contract under their national law as evidenced by inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, express authorisation or entry in the VAT register.

Evidence required

Each tenderer, **including every consortium member and every sub-contractor where applicable**, shall provide a duly filled in and signed **Legal Entity Form** (see **Annex V**) accompanied by the documents requested therein.

3.2.2 Economic & Financial capacity

Requirement

The tenderer, **including every consortium member and every sub-contractor where applicable**, must be in a stable financial position and have the economic and financial capacity to perform the contract.

Evidence required

Proof of economic and financial capacity shall be furnished by the tenderer, **including every consortium member and every sub-contractor where applicable**, as follows:

- Balance sheets or extracts from balance sheets for at least the last two years for which accounts have been closed (where publication of the balance sheet is required under the company law of the country in which the economic operator is established);
- A statement of overall turnover and turnover concerning services/supplies covered by the contract during the last three financial years.

If, for some exceptional reason which the EDA considers justified, the tenderer is unable to provide the references requested by the contracting authority, he may prove his economic and financial capacity by any other means which the EDA considers appropriate.

3.2.3 Technical and professional capacity

Requirement(s)

Tenderers shall:

- Demonstrate knowledge on understanding of a Network Enabled Capability (or similar national/multinational) approach.
- Demonstrate knowledge on civil and military capability development processes.

- Demonstrate knowledge on capability maturity models and the assessment of capability maturity through life-cycle.
- Propose a detailed outline of the study referring to all issues depicted in the “Description of the requested study”.

Knowledge on EU environment, military and civilian structures, involved in CSDP Crisis management operations and the capabilities development aspects to support the EU – led civil-military missions would constitute an advantage.

Evidence required

The following documents or information must be presented as evidence of compliance with the technical and professional criteria:

- The composition of the team and CV’s of the team proposed, based on the requirements provided, to demonstrate the knowledge and experience of the tenderer’s personnel in the above related fields.
- A list of studies, projects and research related to the subject, corresponding in terms of subject, scope and complexity, provided in the past 5 years.
- A statement explaining why the tenderer considers his candidature as being the best placed to be awarded this contract, tackling all aspects depicted in the description of the contract.

4 Award of the contract

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

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

4.1 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 these Terms of Reference.

To this end, the technical proposal shall contain the following information:

- A Rationale document (technical award criteria #1) that demonstrates a good understanding of the problematic and its driving factors, looking at all aspects in the study description.
- A Statement of Work, to include an analytical outline, on how all aspects of the study will be approached (technical award criteria #2).
- The proposed methodology (technical award criteria #3).
- The composition of the team and CV’s of the team proposed, based on the model provided in Annex III, to demonstrate the knowledge and experience of the tenderer’s personnel in the above related fields (technical award criteria #4).
- A list of studies, projects and research related to the subject, corresponding in terms of subject, scope and complexity, provided in the past 5 years (technical award criteria #4)
- All additional documentation deemed necessary from the tenderer’s perspective to demonstrate the ability to meet the prescribed technical requirements.

The quality of each technical offer will be evaluated in accordance with the award criteria and the associated weighting, as detailed in the evaluation grid below.

No.	CRITERIA	Max. Score	Awarded Score
1	<p>Rationale Document. Understanding of:</p> <ul style="list-style-type: none"> • Network Enabled Capability (or similar national/multinational) approach. • Civil capability development processes • Military capability development processes • capability maturity models and the assessment of capability maturity through life-cycle • Optional: the tenderer's knowledge on EU environment, military and civilian structures, involved in CSDP Crisis management operations and the civil and military capabilities development aspects to support the EU – led civil military operations and missions. 	30	
2	<p>Statement of Work. Quality and suitability:</p> <ul style="list-style-type: none"> • Detailed outline of the study referring to all issues depicted in the “Description of the requested study” • Explanations on how the subject and scope of the contract will be implemented • Adequacy of the proposed Work Breakdown Structure and definition of tasks and terms in the work packages; • Innovation / novelty / extension of the current state of the art. 	40	
3	<p>Methodology:</p> <ul style="list-style-type: none"> • Management of the internal resources, e.g. organization of the Project Team, work share between the Project Team members, • Coordination with EDA representatives and provisions for a flexible approach between EDA and the Project Team • Reporting (internal and contractual reports); • Progress meetings and final presentation; • Documentation management; • Risk management tools for capturing technical, financial and planning risks; • Conflict resolution. 	10	
4	<p>Relevant qualifications and experience of the Proposed Project Team: well-balanced theoretical, technological, management and market expertise within the team to perform the contract, with a proven record of providing solutions and particularly innovative solutions.</p> <p>Note: The composition of the proposed team to conduct the project cannot be changed without the written consent of EDA and after a duly written explanation sent by the Contractor.</p>	20	
	TOTAL	100	

Interviews

The Evaluation Committee does not expect to conduct any interviews, but these cannot be excluded.

4.2 Technical proposal

The assessment of the technical quality will be based on the ability of the tenderer to meet the purpose of the contract as described in the terms of reference. To this end, technical proposal shall contain the following information to allow evaluation of their tender according to the technical criteria mentioned above:

- executive summary of the tender,
- statement of work,
- project schedule,
- project management plan,
- summary of the educational and professional qualifications of the project team using the template in **Annex III**,
- other information, as requested in point 4.1.

In addition to the above the tenderer must provide all relevant information concerning sub-contracting.

4.3 Technical quality threshold

Only tenders scoring 75 points or more (of a maximum of 100) points against the technical award criteria will have their financial proposal evaluated.

4.4 Financial evaluation

Where there is a discrepancy between the price quoted in the paper-based financial offer and the one in the electronic version of the financial offer, the price to be considered in the evaluation will be the one on the paper version.

The evaluation will be made on the basis of the price offered. Where a maximum budget is mentioned in these tender specifications, any tenderer submitting a financial proposal exceeding this budget will be rejected.

4.5 Financial proposal

- The financial proposal should be presented in the format found in **Annex II**.
- Prices must be quoted in **EURO** and include all expenses necessary to perform the contract.
- The price quoted is fixed and is subject to **NO revision**.
- Prices must be quoted free of all duties, taxes and other charges (including VAT) as the EDA is exempt from such charges under Article 3 of the Decision of the Representatives of the Governments of the Member States, meeting within the Council, of 10/11/2004, on the Privileges and Immunities granted to the European Defence Agency and to its Staff Members.
- Costs incurred in preparing and submitting tenders are borne by the tenderer and shall not be reimbursed.

4.6 Choice of the selected tender

The most economically advantageous tender is established by weighing technical quality against price on an 80/20 basis.

ANNEX I - DRAFT CONTRACT

ANNEX II - MODEL FINANCIAL OFFER

Prices should be all-inclusive; the Agency will not pay expenses for any additional costs incurred from the execution of the contract.

Financial proposals exceeding the amount indicated in Section 2.4 shall be excluded outright.

Name of Tenderer:	
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TOTAL COST OF ASSIGNMENT, INCLUDING ALL ASSOCIATED EXPENSES AND EXCLUDING VAT :	€
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ANNEX III - CURRICULUM VITAE

EUROPEAN CURRICULUM VITAE FORMAT

PERSONAL INFORMATION

Name

[SURNAME, other name(s)]

Address

[House number, street name, postcode, city, country]

Telephone

Fax

E-mail

Nationality

Date of birth

[Day, month, year]

TOTAL YEARS OF EXPERIENCE

[month, year]

WORK EXPERIENCE

- Dates (from – to)
- Name and address of employer
- Type of business or sector
- Occupation or position held
- Main activities and responsibilities

[Add separate entries for each relevant post occupied, starting with the most recent.]

EDUCATION AND TRAINING

- Dates (from – to)
- Name and type of organisation providing education and training
- Principal subjects/occupational skills covered
- Title of qualification awarded
- Level in national classification (if appropriate)

[Add separate entries for each relevant course you have completed, starting with the most recent.]

**PERSONAL SKILLS
AND COMPETENCES**

Acquired in the course of life and career but not necessarily covered by formal certificates and diplomas.

MOTHER TONGUE

[Specify mother tongue]

OTHER LANGUAGES

[Specify language]

- Reading skills
- Writing skills
- Verbal skills

[Indicate level: excellent, good, basic.]

[Indicate level: excellent, good, basic.]

[Indicate level: excellent, good, basic.]

**SOCIAL SKILLS
AND COMPETENCES**

Living and working with other people, in multicultural environments, in positions where communication is important and situations where teamwork is essential (for example culture and sports), etc.

[Describe these competences and indicate where they were acquired.]

**ORGANISATIONAL SKILLS
AND COMPETENCES**

Coordination and administration of people, projects and budgets; at work, in voluntary work (for example culture and sports) and at home, etc.

[Describe these competences and indicate where they were acquired.]

**TECHNICAL SKILLS
AND COMPETENCES**

With computers, specific kinds of equipment, machinery, etc.

[Describe these competences and indicate where they were acquired.]

**ARTISTIC SKILLS
AND COMPETENCES**

Music, writing, design, etc.

[Describe these competences and indicate where they were acquired.]

**OTHER SKILLS
AND COMPETENCES**

Competences not mentioned above.

[Describe these competences and indicate where they were acquired.]

DRIVING LICENCE(S)

ADDITIONAL INFORMATION

[Include here any other information that may be relevant, for example contact persons, references, etc.]

ANNEXES

[List any attached annexes.]

ANNEX IV - DECLARATION ON EXCLUSION CRITERIA

(To be completed and signed by each Consortium member and by each Sub-contractor, where applicable)

The undersigned:

Name of the individual/company/organisation:

Legal address:

Registration number/ID Card No.:

VAT number:

Declares on oath that the individual/company/organisation mentioned above is not in any of the situations mentioned below:

- a) they are bankrupt or being wound up, are having their affairs administered by the courts, have entered into an arrangement with creditors, have suspended business activities, are the subject of proceedings concerning those matters, or are in any analogous situation arising from a similar procedure provided for in national legislation or regulations;
- b) they have been convicted of an offence concerning their professional conduct by a judgement which has the force of *res judicata*;
- c) they have been guilty of grave professional misconduct proven by any means which the EDA can justify;
- d) they have not fulfilled obligations relating to the payment of social security contributions or the payment of taxes in accordance with the legal provisions of the country in which they are established or with those of the country of the contracting authority or those of the country where the contract is to be performed;
- e) they have been the subject of a judgement which has the force of *res judicata* for fraud, corruption, involvement in a criminal organisation or any other illegal activity detrimental to the Communities' financial interests;
- f) following another procurement procedure or grant award procedure financed by the European Union or the Agency's general budget, they have been declared to be in serious breach of contract for failure to comply with their contractual obligations.
- g) they are subject to a conflict of interest;
- h) they are guilty of misrepresentation in supplying the information required by the contracting authority as a condition of participation in the contract procedure or fail to supply this information

Full name:

Date & Signature:

ANNEX V - LEGAL ENTITY FORM

To be downloaded from the following URL address:
http://ec.europa.eu/budget/info_contract/legal_entities_en.htm

ANNEX VI - FINANCIAL IDENTIFICATION FORM

FINANCIAL IDENTIFICATION

<u>ACCOUNT HOLDER</u>	
NAME	<input type="text"/>
ADDRESS	<input type="text"/>
TOWN/CITY	<input type="text"/> POSTCODE <input type="text"/>
CONTACT PERSON	<input type="text"/>
TELEPHONE	<input type="text"/> FAX <input type="text"/>
E - MAIL	<input type="text"/>
PERSONAL NUMBER	<input type="text"/>
INSTITUTION	<input type="text"/>

<u>BANK</u>	
BANK NAME	<input type="text"/>
ADDRESS	<input type="text"/>
TOWN/CITY	<input type="text"/> POSTCODE <input type="text"/>
ACCOUNT NUMBER	<input type="text"/> - <input type="text"/> - <input type="text"/>
IBAN	<input type="text"/>
SWIFT	<input type="text"/>

REMARKS :

<u>BANK STAMP + SIGNATURE BANK REPRESENTATIVE</u> (Both Obligatory)

<u>DATE + SIGNATURE ACCOUNT HOLDER :</u> (Obligatory)

ANNEX VII - TENDER SUBMISSION FORM

10.CAP.OP.29

One signed original of this tender submission form must be supplied, together with **three copies**.

1. SUBMITTED by (i.e. the identity of the Tenderer)

	Name(s) of legal entity or entities submitting this tender	Nationality³
Leader		
Member 2		
Etc ... ⁴		

2. SUBCONTRACTORS (if applicable)

	Name(s) of the legal entity or entities identified as sub-contractor(s)	Nationality
Sub-contractor 1		
Etc ... ⁵		

³ Country in which the legal entity is registered

⁴ If this tender is being submitted by an individual legal entity, the name of the legal entity should be entered as "Leader" (and all other lines should be deleted)

⁵ Add / delete additional lines for sub-contractors as appropriate

3. CONTACT PERSON for this tender (to act as focal point for all communication which may take place between the EDA and the Tenderer)

Name and position	
Organisation	
Address	
Telephone	
Fax	
e-mail	

4. STATEMENT

I, the undersigned, being the authorised signatory of the above Tenderer (including all consortium members, in the case of a consortium), hereby declare that we have examined and accept without reserve or restriction the entire contents of the tender specifications for the tender procedure referred to above.

We are fully aware that, in the case of a consortium, the composition of the consortium cannot be modified in the course of the tender procedure except with the prior written authorisation of the EDA. We are also aware that the consortium members would have joint and several liability towards the EDA concerning participation in both the above procedure and any contract awarded to us as a result of it.

Our tender is subject to acceptance within the validity period stipulated in point 1.7 of the Tender Specifications and is made up of the following documents:

ENVELOPE A - ADMINISTRATIVE DATA:	
▪ This Tender Submission Form	<input type="checkbox"/>
▪ The duly filled in, signed and dated Exclusion Criteria Declaration(s) by every legal entity identified under point 1 and point 2 of this Tender Submission Form	<input type="checkbox"/>
▪ The duly filled in, signed and dated Legal Entity Form (<i>using the standard template referred to in Annex V to the Tender Specifications</i>) and the supporting documents requested therein, by every legal entity identified under point 1 and point 2 of this Tender Submission Form	<input type="checkbox"/>
▪ The duly filled in, signed and dated Financial Identification Form (<i>using the standard template in Annex VI to the Tender Specifications</i>) to nominate the bank account into which payments would be made in the event that our tender is successful	<input type="checkbox"/>
▪ Documents proving the economic and financial status (as requested in Section 3.2.2 of the Tender Specifications) of every legal entity identified under point 1 and point 2 of this tender submission form	<input type="checkbox"/>
▪ Documents proving our technical and professional capacity (as requested in Section 3.2.3 of the Tender Specifications)	<input type="checkbox"/>
▪ Duly authorised signature , i.e. an official document (<i>statutes, power of attorney, notary statement, etc.</i>) proving that the person who signs on behalf of the Tenderer is duly authorised to do so	<input type="checkbox"/>
▪ Our consortium agreement where applicable, specifying the company or person heading the project and authorised to submit a tender on behalf of the consortium, as requested in Section 1.4 of the tender specifications	<input type="checkbox"/>
ENVELOPE B - TECHNICAL PROPOSAL (one signed original and three photocopies providing all information requested in the Tender Specifications).	<input type="checkbox"/>
ENVELOPE C - FINANCIAL PROPOSAL (one signed original, three photocopies <u>and an electronic version</u> using the template in Annex II), which is submitted in a separate, sealed envelope.	<input type="checkbox"/>

Signed on behalf of the Tenderer

Name	
Signature	
Date	