

## TENDER SPECIFICATIONS

**Reference:** OC/EFSA/AFSCO/2016/01  
**Subject:** Developing, organizing and delivering of training activities under the EFSA European Food Risk Assessment Fellowship Programme  
**Procurement procedure:** Open call  
**Project/Process code:** AFSCO - 13  
**Activity Code:** 3.3

Tender specifications purpose:

1. specify what EFSA is to buy under the contract resulting from this tender procedure
2. announce the criteria which EFSA will apply to determine the successful contractor among the offers received
3. guide tenderers to establish and dispatch their offer in the required form and time

These tender specifications will form annex 1 of the contract resulting from this tender procedure and will be binding during the contract implementation.

### Provide EFSA with feedback:

If you considered applying to this call for tenders but finally decided not to do so, your feedback and reasoning for such a decision would be very much appreciated. You should address your feedback to [EFSAProcurement@efsa.europa.eu](mailto:EFSAProcurement@efsa.europa.eu). Please note that your comments will be kept strictly confidential and will only be used for the purpose of improving future EFSA procurement calls.

### INDICATIVE PROCEDURE TIMETABLE

Milestone	Date <sup>1</sup>	Comments
Launch date	14/06/2016	Date of publication being sent to OJ
Deadline for sending a request for clarification to EFSA	07/09/2016	
"Receipt Time Limit" - Closing date and time for offers reception	<b>15/09/2016 at 14:30 CET</b>	See details in the Invitation letter. Please also refer to the e-Submission application description attached in annex 2 hereto.
Opening session	16/09/2016	14:30hr, EFSA premises, Parma
Notification of the evaluation results	October 2016	Estimated. <i>Attention: outcome of the present procurement procedure will be communicated to all tenderers to the e-mail address indicated in their offer. Accordingly, the tenderers who have submitted offers under the present call are strongly invited to check regularly the mailbox in question.</i>
Contract signature	October 2016	Estimated

<sup>1</sup> All times are in the time zone of the country of the EFSA.

## TABLE OF CONTENT

<b>PART 1 TECHNICAL SPECIFICATIONS - WHAT DOES EFSA NEED TO BUY THROUGH THIS PROCUREMENT PROCEDURE?</b> .....	<b>3</b>
1.1 BACKGROUND .....	3
1.2 OBJECTIVES .....	6
1.3 TASKS AND DELIVERABLES .....	7
1.4 INFORMATION ON THE CONTRACT .....	19
1.5 OWNERSHIP AND INTELLECTUAL PROPERTY RIGHTS .....	20
1.6 ADDITIONAL INFORMATION .....	20
<b>PART 2 EVALUATION - HOW WILL YOUR OFFER BE ASSESSED?</b> .....	<b>22</b>
2.1 OPENING OF OFFERS .....	22
2.2 ORDER OF EVALUATION .....	22
2.3 GROUNDS FOR EXCLUSION .....	22
2.4 SELECTION CRITERIA .....	22
2.5 COMPLIANCE WITH TENDER SPECIFICATION AND MINIMUM REQUIREMENTS.....	26
2.6 AWARD CRITERIA .....	26
<b>PART 3 CONTENT OF THE OFFER – HOW TO SUBMIT YOUR OFFER &amp; WHAT SHOULD YOUR OFFER CONSIST OF?</b> .....	<b>29</b>
<b>ANNEX 1 - FINANCIAL OFFER TEMPLATE</b> .....	<b>34</b>
<b>ANNEX 2 – E-SUBMISSION APPLICATION DESCRIPTION</b> .....	<b>35</b>
<b>ANNEX 3 - DRAFT CONTRACT</b> .....	<b>37</b>
<b>ANNEX 4 - DECLARATION ON HONOUR ON EXCLUSION CRITERIA</b> .....	<b>37</b>
<b>ANNEX 5 - DECLARATION ON HONOUR ON SELECTION CRITERIA</b> .....	<b>37</b>
<b>ANNEX 6 – INSTITUTIONAL DECLARATION OF INTERESTS</b> .....	<b>37</b>
<b>ANNEX 7 – INDIVIDUAL DECLARATION OF INTERESTS</b> .....	<b>37</b>
<b>ANNEX 8 – MINIMUM REQUIREMENTS FOR TRAINING CONTENT</b> .....	<b>37</b>
<b>ANNEX 9 – ADMINISTRATIVE IDENTIFICATION FORM</b> .....	<b>37</b>

## **PART 1 TECHNICAL SPECIFICATIONS - WHAT DOES EFSA NEED TO BUY THROUGH THIS PROCUREMENT PROCEDURE?**

### **1.1 BACKGROUND**

#### **1.1.1 EFSA strategy 2020**

*"Build the EU's regulatory science capacity and knowledge community", with the overall objective to set up cooperation initiatives aimed at making the best scientific capabilities available through a sustainable model.*

Fostering the EU and international risk assessment community is a specific operational objective under this heading of the [EFSA Strategy 2020](#) and the proposed procurement procedure for the development, organisation and delivery of training activities under the EFSA European Food Risk Assessment Fellowship Programme will make a significant contribution to meeting this objective.

Sustainability is EFSA's second key strategic objective, as laid down in the [EFSA Single Programming Document 2015 -2017](#), calling to step up cooperation with national food safety agencies to build the EU risk assessment community. The Scientific Cooperation Roadmap sets out the work together with Member States (MSs) also by increasing training opportunities.

#### **1.1.2 Background to the EFSA Fellowship Programme**

The European Risk Assessment Fellowship Programme is an initiative of the European Food Safety Authority to strengthen Europe's food safety risk assessment capacity and build the risk assessment knowledge community.

The programme is designed predominantly to offer a 1-year, learning-by-doing fellowship service placement accompanied by a specific Food Risk Assessment training programme, to attract early-mid career scientists from MS authorities with limited experience in food safety risk assessment. Fellows would be placed in art.36 Organisations<sup>2</sup> with solid risk assessment capacity in other MSs in order to build capacity across organisations and MSs, contributing to harmonising methodologies and practises within the EU.

The expected benefits of the Fellowship Programme are to:

- Attract 'early-mid career scientists' to become risk assessors;
- Intensify exchange and cooperation among national food agencies and EFSA;
- Contribute to harmonising risk assessment practices across Europe;
- Further develop risk assessment methodologies in Europe.

Further more detailed information about the overall Fellowship Programme outline and a tentative timetable can be found on the EFSA website<sup>3</sup>.

---

<sup>2</sup> Competent organisations designated by the Member States which may assist EFSA with its mission in accordance with Art. 36 of Regulation EC 178/2002 and Art. 1 of Regulation EC 2230/2004. The full list of art.36 organisations is found at <https://www.efsa.europa.eu/sites/default/files/assets/art36listq.pdf>

<sup>3</sup> <https://www.efsa.europa.eu/sites/default/files/160210a-p6.pdf>

This procurement procedure aims to select a contractor for the development, organisation and delivery of training activities under the EFSA European Food Risk Assessment Fellowship Programme. EFSA will be directly responsible for all contact, liaison and management of the programme with the awarded contractor.

### 1.1.3 Overview of the annual summer workshop and participants

In each of the two 12 month fellowship cycles, the contractor will be responsible for the organisation and delivery of a summer workshop which will take place prior to the commencement of each 12 month fellowship cycle.

	<b>Event</b>	<b>Provisional When &amp; Where</b>	<b>Approximate number and type of participants</b>
1	Summer workshop	EFSA Parma June 2017 & June 2018	Approximately 40 participants including: <ul style="list-style-type: none"> <li>Contractors project team, including tutors</li> <li>Fellow committee members (EFSA &amp; MSs representatives)</li> <li>Hosting site mentors</li> <li>EFSA management representatives</li> </ul>

### 1.1.4 Overview of the training events and participants

In each of the two 12 month fellowship cycles, the contractor will be responsible for the organisation and delivery of the training events outlined in the table below and described in more detail later in these tender specifications.

	<b>Training event<sup>4</sup></b>	<b>Provisional When &amp; Where</b>	<b>Approximate number and type of participant</b>
1	Induction training (3 weeks)	EFSA Parma September 2017 & September 2018	15 fellows 5 EFSA staff 5 MS participants 5 PhD participants
2	Module 1 (1 week)	Austria December 2017 & December 2018	15 fellows

<sup>4</sup> Training event is defined as either the three-week Induction Training Event or one of the three, one-week Specific Module Training Events.

3	Module 2 (1 week)	Germany March 2018 & March 2019 ----- EFSA Parma Dates TBC in 2018 & 2019	15 fellows  ----- 30 EFSA staff
4	Module 3 (1 week)	Greece June 2018 & June 2019 ----- EFSA Parma Dates TBC in 2018 & 2019	15 fellows  ----- 30 EFSA staff

Specifically in relation to Module 2 and Module 3, these will be repeated once per cycle on EFSA premises, only for EFSA staff attendance, in order for approximately 30 EFSA staff to benefit from the training in modules 2 and 3. The dates will be decided in agreement between EFSA and the contractor. Further information is provided in section 1.3.9 of these tender specifications.

Four types of participant are expected to attend the training events to be provided under the Fellowship Programme:

- **Fellowship participants**

The main focus of the fellowship programme is to attract scientists (early / mid-career professionals) involved in different scientific domains supporting food safety risk assessment such as: biological and chemical safety, animal and plant health, GMO and other biotechnologies, and nutrition. The focus would be on biological and chemical safety to attract professionals from one of the following fields: Molecular Biology, Biology, Microbiology, Veterinary/Human Medicine or Agronomy/Agricultural Science, Biochemistry, Chemistry, Environmental Science, Food Technology, or Toxicology.

The fellows will be selected through a call for expressions of interest organised by EFSA. One call for expressions of interest will be held for each 12 month fellowship cycle in order to select the fellows.

It is expected there will be a maximum of 15 participants per 12 month fellowship cycle starting in September 2017 and again in September 2018. Fellows from the first cycle starting in September 2017 will also be required to travel to EFSA for the first day of the induction training in the second cycle in order to receive their certificate and to present to the second cycle cohort of fellows their experiences and to facilitate networking amongst fellows across training cycles.

When the selected participants start their fellowships, they may have only a basic knowledge of Food Safety Risk Assessment and possibly limited knowledge of Food Safety. The core concept of the European Risk Assessment Fellowship Programme is the placement of each selected fellow in a MS with high capacity in performing Risk Assessment where they will stay for one year, mostly learning by doing. For this reason their understanding, knowledge and experience in Food Risk Assessment will grow as the time advances. Following a three-week induction training, EFSA will offer increasingly higher levels of training, as the background knowledge of the fellow becomes more advanced. The induction and specific training modules will be the same for all fellowship participants, so as to ensure

that all fellows will have at least a basic spherical understanding of all main fields related to Food Risk Assessment.

For the induction training only the following participants are also included:

- **EFSA participants**

In addition to the 15 above-mentioned fellows, EFSA will offer approximately 5 additional places to the induction training only to EFSA staff who will have a similar scientific background to the fellows.

- **Member State participants**

In addition to the 15 above-mentioned fellows, EFSA will offer approximately 5 places to the induction training only to participants from the MS competent food authorities i.e. National Food Safety Authorities plus article 36 organisations.

- **PhD participants**

In addition to the above-mentioned 15 fellows, EFSA will offer a maximum of 5 places to PhD students studying in a relevant food risk assessment scientific area.

## 1.2 OBJECTIVES

The aim of this procurement procedure is to conclude a framework contract for four years with one contractor for the development, organisation and delivery of training activities under the EFSA European Food Risk Assessment Fellowship Programme.

### **Training objective:**

For the participants to acquire a firm knowledge of the EU Food Safety System, the main legislation related to EFSA, the scientific principles of Food Risk Analysis and in particular Food Risk Assessment, the way EFSA is structured, the main characteristics of the different types of food risk assessment (Chemical and regulated products, microbiological, GMO, Environmental, animal health and welfare, plant health and welfare).

### **Overall Training Content:**

The detailed content and duration of each training module is set out in Annex 8 (Minimum Requirements for Training Content) of these tender specifications. Broadly, the materials will cover the following:

- Introduction to Food Safety and Food Risk Assessment and description of the International and EU framework;
- Description of Chemical Food Risk Assessment;
- Description of Microbiological Risk Assessment;
- Presentation of additional fields relevant to Food Risk Assessment;
- Aspects of Risk Communication and Crisis preparedness and response;
- Advanced aspects of Food Risk Assessment and futures challenges;

The training content will contribute to achieve the objectives of the overall fellowship programme. The training content topics and structure are defined by EFSA in Annex 8. Format, including the timing and the full content of the training sessions will be designed by the Contractor in order to fully reach the objectives indicated above.

The trainings will consist of a balanced mix of theoretical (40%-50%) and practical trainings (50%-60%) per training week, with emphasis on the practical exercises, using case-studies (based on EFSA scientific opinions), interactive exercises such

as role play, simulations, quizzes etc. Discussion sessions shall be organised for exchange of views and feedback from participants. The Contractor shall also include online learning tools, group computer research, etc., to ensure a complete and better understanding on the covered field by the participants. In addition, the Contractor shall include education tools such as videos or use of network platforms, databases into the training courses in order to increase the understanding of the given subjects and to make the training interactive and interesting for the participants.

EFSA shall give the final approval on the format and full content proposed by the contractor as well as on the timing of all training events. The contractor may also need to accommodate and factor into the agreed schedules, one 45 minute presentation per training week, including Q&A, which would be delivered by EFSA scientific staff or the MSs representative. The contractor will be informed in advance of each training event whether or not such a session needs to be accommodated into the training event schedule.

**Organisational & logistical objective:**

In addition to the development and delivery of the training events, the contractor chosen as a result of this procurement procedure will be responsible for all organisational and logistical aspects of the training events and summer workshops. Specific tasks are described in section 1.3 below but an overarching objective for the chosen contractor is to ensure smooth running and organisation of all aspects of the training events and summer workshops, in the period leading up to each event, during and after.

**1.3 TASKS AND DELIVERABLES**

**1.3.1 Project Team**

The contractor chosen as a result of this procurement procedure will be required to appoint a project team who meet the minimum expertise requirements defined in section 2.4B of these tender specifications. Below follows an explanation of the tasks and deliverables required of each project team member.

• **Project Manager**

One Project Manager should be appointed for the duration of the contract who has the overall responsibility for the development and implementation of the training programme as well as the preparatory summer workshops. He/she should have the authority to mobilise the resources necessary for the successful implementation of the training activities and summer workshops. He/she will be responsible for the daily control, coordination and management of the contract implementation and the needed communication with EFSA on the contract, which means that he/she will be the single contact and communication point and that he/she will coordinate the implementation of the contract with EFSA.

• **Event Manager**

The contractor should appoint, for each planned event, an Event Manager responsible for all practical, logistical and organisational aspects of that event. It should be noted that a different Event Manager can be appointed for each planned event but the appointed individual must meet the minimum expertise requirements set out in the selection criteria in section 2.4B of these tender specifications. The Event Manager shall not be part of the team of tutors.

The Event Manager must be involved in all implementation steps, attend the activity and coordinate all different possible issues. The Event Manager shall have the entire authorisation to take the necessary and immediate decisions regarding

the practical arrangements of the trainings and summer workshops i.e. travel of the participants, food and or lodging issues. The Event Manager will be responsible for the organisation of the summer workshop and social events. They will take care that participants are well informed well in advance about the training activities, summer workshops, social events and traveling schedules and any other events which do not take place in the venue of the training events. They will ensure the booking of a suitable training room in the chosen host city for each training event, the provision of all technical equipment/materials necessary for the training and the provision of all necessary catering/refreshment services. For those training events which will take place at EFSA or in the institutional premises of one of the volunteer hosting countries, close liaison with the nominated contact person from the training hosting site (described in section 1.3.2) in order to ensure suitability of the training rooms and provision of the required materials will be required. During each entire event, the Event Manager shall be present on site, starting with the day of the arrival and ending with the day of departure of the participants. The Event Manager, based on the feedback from participants collected by the Training Coordinator at the end of each training week, described below, ensures appropriate improvement where required in the area of organisation, logistics and information to participants.

- **Scientific Content Manager**

The Contractor shall appoint one person as Scientific Content Manager for the duration of the contract, responsible for the development of scientific content of all the trainings events. The Scientific Content Manager shall not be part of the team of tutors.

The Scientific Content Manager, for each training event, will:

- ensure all scientific training material is complete together with the detailed training calendar in line with the training outline in annex 8;
- ensure the coherence of lectures' scientific content;
- assign the appropriate tutors for each training event in line with the scientific topics to be covered;
- based on the training evaluations / feedback received from the Training Coordinator following each training event, ensure appropriate improvement where required;
- be responsible, in cooperation with the Training Coordinator, for the proposal to EFSA for their approval, of an appropriate substitute tutor in case of absent tutor;
- ensure all actions to be taken are agreed in advance with EFSA.

- **Training Coordinator**

The Contractor shall appoint one person as a Training Coordinator specifically responsible for the technical aspects of each training event and he/she shall be one of the tutors'. It should be noted that a different Training Coordinator can be appointed for each planned event but the appointed individual must meet the minimum expertise requirements set out in the selection criteria in section 2.4B of these tender specifications.

His/her tasks include in particular the coordination of the work of the tutors', training methodology and practical delivery at the training site. During the entire training event, the Training Coordinator shall be present on site, be available to answer the questions related to the technical subject of the training, assist the tutors with technical guidance and ensure the appropriate communication during the training events between the participants and tutors.

At the end of each week, an evaluation form, to be developed by the Contractor in consultation with EFSA, will allow participants to evaluate the tutors, including the Training Coordinator, the training content and delivery and the organisational and logistical aspects of the training event provided by the Contractor. The Training Coordinator will provide EFSA with the individual feedback forms of each participant and in addition will prepare a summary of the feedback for each training event, all within 5 working days from the end of each training event. He/she will further ensure appropriate improvements where required in coordination with the Scientific Content Manager.

EFSA will retain the right to reject proposed Training Coordinators on the basis of poor evaluation by the participants and/or observers. In this case, the Training Coordinator, even though being replaced in his/her role as Training Coordinator, is not excluded from pursuing his/her role as a tutor. In case the Training Coordinator is absent during a session, then an alternate Training Coordinator should be appointed by the Contractor from among the other assigned tutors in agreement with EFSA for the duration of the absence.

In case of unforeseen events which might result in the unavailability of the Project Manager, the Scientific Content Manager, an Event Manager or a Training Coordinator, the Contractor is obliged to inform EFSA immediately and propose an alternative person in order to continue with the training. The Contractor needs to provide a suitable alternative candidate for the replacement, meeting the minimum expertise requirements under the selection criteria in section 2.4B of these tender specifications. The request for such change needs to be done via email to EFSA for approval.

- **Tutors**

The Contractor shall appoint a pool of qualified and experienced tutors, each of which must meet the minimum expertise requirements set out in the selection criteria in section 2.4B of these tender specifications. EFSA will reserve the right to reject proposed tutors and request a replacement, both on the basis of an assessment of the individuals experience and compliance with the minimum expertise requirements of section 2.4B of these tender specifications and an assessment of the Individual Declaration of Interest of the tutor.

All tutors, in addition to their scientific professional expertise corresponding to one or more training topics should have solid teaching experience in academic and/or professional learning programmes and be able to meet the requirement to provide training with extensive interactive elements and practical sessions in line with the targeted balance of 40%-50% theory and 50-60 % interactive/practical training events per training week.

The minimum number of tutors for delivering the training programme is 5 different tutors for each training week. This number includes the Training Coordinator. The same tutors can teach in different weeks and modules if they have the necessary expertise.

During the delivery of the trainings, tutors that were evaluated with low scores by the majority of participants and/or observers after each training event for their behaviour, scientific knowledge or teaching efficiency will have to be replaced by the Contractor with competent tutors from the reserve list who are able to cover the same training topics. The proposed replacement tutor shall be agreed on by EFSA. The scoring scale for the evaluation of the tutors and Training Coordinator is to be determined in consultation between EFSA and the Contractor when the feedback form is devised in advance of the first training event. The feedback form will make clear the score below which the tutor would need to be replaced.

In case of an ad hoc situation (no show of one or more tutors), the Contractor shall propose a competent substitute able to cover the same training topics as the initially assigned tutor. The substitute must meet fully the minimum expertise requirements under the selection criteria in section 2.4B of these tender specifications. The proposed substitute tutor shall be agreed on by EFSA.

### **1.3.2 Venue of the training events (Training Hosting Sites)**

EFSA has provisionally identified the locations where the training events will be held (training hosting sites in the capital cities of Germany, Greece and Austria) as well as the venue for the induction training and summer workshops which are expected to be held in Parma, Italy.

#### **Induction training and summer workshop at EFSA's premises**

For the induction training which takes place at EFSA's premises, EFSA will provide a suitable room, all technical equipment e.g. projector, screen, flip chart, WiFi access, and will provide refreshments during breaks. Fellows will be able to use the EFSA canteen for lunch, at their own charge. Catering arrangements for lunch and refreshments during breaks will not be at the charge of the Contractor.

For the summer workshop which takes place at EFSA's premises, EFSA will provide a suitable room, all technical equipment e.g. projector, screen, flip chart, WiFi access, and will provide refreshments during breaks. Attendees will also have their lunch catered for by EFSA. Catering arrangements for lunch and refreshments during breaks will not be at the charge of the Contractor. One social event should be organised by the Contractor during the summer workshop (described in section 1.3.5). This event will be at the charge of the Contractor.

#### **One week modules (1, 2 and 3) at training hosting sites**

The Event Manager of the Contractor will be responsible for booking a suitable training room in the nominated capital city which has been chosen to host the training. The training room should be in the same hotel chosen to accommodate the fellows (see section 1.3.3 below), be of a suitable size for the number of participants and provide all technical equipment required for the training e.g. projector, screen, flip chart, WiFi access. The Contractor should also arrange for the chosen venue to provide refreshments during breaks and lunch.

During the implementation of the programme, the institutional premises of one of the volunteer hosting countries **may** offer to provide a suitable training room, including all necessary equipment, catering and refreshment. In that case the Contractor will not be responsible for payment of the training room or catering. In this case the Contractor should ensure that the accommodation of the training participant (see section 1.3.3 below) is conveniently situated for daily travel to the institutional premises volunteered by the hosting countries.

### **1.3.3 Accommodation**

Concerning the accommodation of approximately 15 fellow training participants and 5 PhD students (PhD students only for the induction training), the Contractor must identify appropriate accommodation in each identified location where all participants can be accommodated in an appropriate single room with private bathroom, in the standard of a four star hotel or equivalent, with free access to internet.

As training events are due to start on Monday mornings at 9am, accommodation would be required from the night before.

The accommodation offered to the participants will be full board, including breakfast, lunch<sup>5</sup> and dinner (all meals should meet any special requirements of the participants based on ethical, religious and / or health requirements), for the entire period of their stay, in a hotel which is also able to offer all the practical facilities required to accommodate the training events as described above in section 1.3.2).

### **1.3.4 Travel**

#### **Induction training related travel**

Concerning the travel of a maximum of 15 fellow training participants and 5 PhD students, participants will need to travel from their home to the training hosting site and return.

The price offered by the Contractor shall cover all flights-transfers (in economy class or other price equivalent class) or train/bus-transfers (in first class) from the home location specified by each participant, and shall include transfer from the airport and bus/rail stations to the training locations, as well as to possible social event visit locations.

At the start of the second cycle (September 2018), for day 1 of the induction training, the fellows from the first cycle will also need to attend EFSA to receive their certificate, make a presentation and network with the new fellows on the second cycle. Therefore, the Contractor will also be responsible for organising and paying for travel and accommodation of those fellows, in addition to the new fellows for the September 2018 cycle. All travel should be arranged for the weekend so as to ensure all fellows are present for the full day induction training starting on the Monday morning.

#### **One week training modules related travel**

Concerning the travel of a maximum of 15 fellow training participants, the price offered by the Contractor shall cover all flights-transfers (in economy class or other price equivalent class) or train/bus-transfers (in first class) either from the specified home location of the participant or from their fellow hosting site location, and shall include transfer from the airport and bus/rail stations to the training locations, as well as to possible social event visit locations.

In general in relation to travel, it should be noted:

- Travel arrangements for the Contractors tutors and Project team members are to be covered by the Contractor;
- The Contractor will not be responsible for the travel / accommodation arrangements of any participating EFSA staff or Member State participants;
- For the 3 weeks induction training it is understood that fellows and PhD students, will travel only once, i.e. at the start of the training and return at the end of the three week period. Therefore accommodation will be required over the weekend periods during the 3 weeks induction;
- For the 1 week modules it is understood that fellows will travel only once, i.e. the day before the start of the training and return at the end of the one week module. The participant can chose whether the travel is from their home location or from the fellow hosting site in which they are residing.

### **1.3.5 Social Events**

---

<sup>5</sup> In the event that a training event is held in the institutional premises of a volunteer hosting country, the participants would not be expected to return to their accommodation for lunch. Accommodation for that particular training event should therefore be on a half-board basis.

In addition to the accommodation and travel obligations, the Contractor will organise at each training event, as well as the yearly summer workshop, an event which comprises a welcome drink, a joint dinner and a sightseeing event. These events shall promote the networking within the gathered group of people and facilitate discussions and exchange of views during and after the training.

The social event shall be available free of additional charge to all persons present, the cost of the event shall be covered by the Contractor and the exact number of participants will be confirmed when the order/specific contract is made. By way of illustration, such an event in the Parma area could be an organised trip to a local parmesan production factory, followed by drinks and dinner.

Number of events & participants per 12 month cycle (x2):

- Three weeks induction training => 2 events during the course of the three week induction to take place during the first and second weekend; (estimated number of participants 40 in total (approx.15 fellows + 10 EFSA staff and/or MS representatives + 5 PhD's, observer and representatives from EFSA). The Contractor shall be responsible for the costs of travel to and from the event and the cost for each participant to attend the social events.
- One week training modules (3 in total) => 1 event per week => 3 in total to take place during one evening during the working week (approx. number of participants, 15 fellow participants + observer + 2 local mentors and representatives of the hosting site). The Contractor shall be responsible for the costs of travel to and from the event and the cost for each participant to attend the social events.
- 1.5 days kick-off summer workshop => 1 per year => approx. number of participants 40 (Contractors project team, tutors, fellow committee members, EFSA representatives, hosting site mentors). The Contractor shall be responsible for the costs of travel to and from the event and the cost for each participant to attend the social events.

### **1.3.6 Tasks during each training event**

At each training event, the Contractor will ensure registration of all participants and provide information and assistance to participants from their departure point until their arrival at the training hosting site.

In addition, the Contractor shall:

- ensure that participants can access internet free of charge, at least once daily;
- provide for all administrative work, including copies and mail, related to the training events;
- provide information and training pack content electronically on a USB to all training participants at each training event as well as at the yearly summer workshop, containing all training and information materials, documentation needed for the training session and the yearly summer workshop. The electronic information and training pack should be available in English, be revised and proofread, and take the form of a comprehensive stand-alone set of documents covering all the issues dealt with during the training and/or workshop session. In the event that hard copy materials are required during the individual sessions for training participants to work on, the Contractor will be responsible for ensuring the tutor is able to provide all hard copy materials necessary;

- implement the procedure assessing the level of satisfaction of the training participants with the training and service received as described in details above in the section on tasks of the Training Coordinator.

### **1.3.7 Language**

The training courses will be delivered in English which must be of an excellent standard, specifically meeting the minimum expertise requirements for language set out in section 2.4B under selection criteria. All training materials must be written in clear, grammatically sound and intelligible English which does not require further editorial amendment or correction.

### **1.3.8 Training materials**

The Contractor will develop the training material in the form of presentations, business cases, technical documentation and other study materials used during any of the training modules and induction, based on the detailed training content structure defined under Annex 8.

All training material should be developed as standalone material, meaning to be used by EFSA and shared with third parties in accordance with the provisions on the contract (articles I.10 and II.13) and independently of the tutor using this material during the fellowship programme. All material should be made available by the Contractor on a USB key. In case of updates, the Contractor shall make the new version available on a USB key for each participant.

All training material shall be submitted by the Contractor to EFSA for review until meeting the minimum requirements for training content as set out in these tender specifications and in particular in annex 8.

In relation to materials to be provided to participants during the training, the Contractor should provide each participant with a pen, paper notepad and folder for storage of any hard copy materials and hand-outs.

In addition, the Contractor will be responsible for taking a group photograph at each training event of all the participants. The photo should be printed in A4 and distributed to each participant in hard copy, as well as providing an electronic copy to each participant by inclusion on the above-mentioned USB stick.

### **1.3.9 Delivery of training on modules 2 and 3 to EFSA staff only**

Training modules 2 and 3 will be requested to be presented to EFSA staff, on EFSA premises in Parma, Italy on dates which are to be agreed with the Contractor. It is envisaged that the groups of EFSA staff will not exceed 30 participants per one week training and it is likely that the training will be requested to be carried out in 2018 and repeated in 2019.

Module 2 will be of shorter duration than when presented to the fellows. When presented to EFSA staff, this module will be 3.5 days rather than 5 days duration.

Each one week module will be presented separately, in separate weeks. The Contractor will be required to comply with the language and materials requirements as described above but will not be responsible for any logistical arrangements in relation to the EFSA staff participants, i.e. room bookings, equipment, registration of participants, refreshments will all be taken care of by EFSA. No social events or accommodation or travel for participants will need to be organised by the Contractor. The Contractor will be

required however to complete the evaluation of module 2 and 3 and to provide the feedback to EFSA as described above in the section related to tasks of the Training Coordinator.

No	Task and deliverables	Can be subcontracted ?	Deadline for finalisation
1	<p><b>INDUCTION TRAINING</b> Preparation of induction training schedule and full content. To include all aspects described in these tender specifications (including Annex 8) and to incorporate all feedback provided by EFSA on the draft materials, until arriving at a finalised package of induction material agreed with EFSA.</p> <p><b>Deliverable 1:</b> Draft induction schedule and full content for discussion with EFSA</p> <p><b>Deliverable 2:</b> Final induction schedule and full content for agreement of EFSA</p> <p><b>Deliverable 3:</b> In relation to the price offered for the preparation of the induction training schedule and full content, the price should also include any adaptations/updates to the materials which may be required as a result of recommendations included in each training event evaluation report.</p>	Yes	<p><b>Deliverable 1:</b> 8 weeks after kick-off meeting.</p> <p><b>Deliverable 2:</b> 12 weeks after kick-off meeting.</p> <p><b>Deliverable 3:</b> May 2018</p>
2	<p><b>MODULE 1</b> Preparation of module 1 training schedule and full content. To include all aspects described in these tender specifications (including Annex 8) and to incorporate all feedback provided by EFSA on the draft materials, until arriving at a finalised package of module 1 material agreed with EFSA.</p> <p><b>Deliverable 1:</b> Draft module 1 schedule and full content for discussion with EFSA</p> <p><b>Deliverable 2:</b> Final module 1 schedule and full content for agreement of EFSA</p> <p><b>Deliverable 3:</b> In relation to the price offered for the preparation of the module 1 training schedule and full content, the price should also include any adaptations/updates to the materials which may be required as a result of recommendations included in each training event evaluation report.</p>	Yes	<p><b>Deliverable 1:</b> to be defined in the specific contract<sup>6</sup>.</p> <p><b>Deliverable 2:</b> to be defined in the specific contract.</p> <p><b>Deliverable 3:</b> May 2018</p>
3		Yes	

<sup>6</sup> The contractor may be required to prepare the training schedule and full content for modules 1, 2 and 3 in parallel to the induction training materials. Precise dates and delivery schedules will be defined in each specific contract for each module.

	<p><b>MODULE 2</b> Preparation of module 2 training schedule and full content. To include all aspects described in these tender specifications (including Annex 8) and to incorporate all feedback provided by EFSA on the draft materials, until arriving at a finalised package of module 2 material agreed with EFSA.</p> <p><b>Deliverable 1:</b> Draft module 2 schedule and full content for discussion with EFSA</p> <p><b>Deliverable 2:</b> Final module 2 schedule and full content for agreement of EFSA</p> <p><b>Deliverable 3:</b> In relation to the price offered for the preparation of the module 2 training schedule and full content, the price should also include any adaptations/updates to the materials which may be required as a result of recommendations included in each training event evaluation report.</p>		<p><b>Deliverable 1:</b> to be defined in the specific contract<sup>7</sup>.</p> <p><b>Deliverable 2:</b> to be defined in the specific contract.</p> <p><b>Deliverable 3:</b> May 2018</p>
4	<p><b>MODULE 3</b> Preparation of module 3 training schedule and full content. To include all aspects described in these tender specifications (including Annex 8) and to incorporate all feedback provided by EFSA on the draft materials, until arriving at a finalised package of module 3 material agreed with EFSA.</p> <p><b>Deliverable 1:</b> Draft module 3 schedule and full content for discussion with EFSA</p> <p><b>Deliverable 2:</b> Final module 3 schedule and full content for agreement of EFSA</p> <p><b>Deliverable 3:</b> In relation to the price offered for the preparation of the module 3 training schedule and full content, the price should also include any adaptations/updates to the materials which may be required as a result of recommendations included in each training event evaluation report.</p>	Yes	<p><b>Deliverable 1:</b> to be defined in the specific contract<sup>8</sup>.</p> <p><b>Deliverable 2:</b> to be defined in the specific contract.</p> <p><b>Deliverable 3:</b> May 2018</p>
5	<p><b>1.5 days summer workshop organisation and delivery.</b></p> <p><b>Deliverable 1:</b> Plan of organisational aspects of summer workshop, including all logistical elements inc. dinner and social event; draft agenda; draft presentation on Contractors role and overall content of training modules; all for agreement with EFSA prior to the workshop</p>	Yes	<p><b>Deliverable 1:</b> Early May 2017 and again in early May 2018</p> <p><b>Deliverable 2:</b> June 2017 and June 2018</p>

<sup>7</sup> See footnote 6.

<sup>8</sup> See footnote 6.

	<p><b>Deliverable 2:</b> Deliver summer workshop; facilitate all aspects of the meeting; preparation of minutes following each summer workshop.</p>		
6	<p><b>Organisation and delivery of the <i>induction module</i> in September 2017 and again in September 2018.</b></p> <p><b>Deliverable 1:</b> Plan of all organisational aspects including all logistical elements (as described in these tender specifications); for agreement with EFSA prior to the commencement of three week induction module. It should be noted that this plan should include details of the specific tutors allocated to each specific training topic within the module, this proposal should include the Training Coordinator – both of which are subject to approval by EFSA.</p> <p><b>Deliverable 2:</b> Actual delivery of induction training including all operational, logistical aspects as described in these tender specifications. It should be noted that this deliverable also includes the collection of weekly feedback from all training participants and preparation of a summary report to be provided within 5 working days of the end of the induction training as well as undertaking any necessary follow-up actions based on feedback.</p>	Yes	<p><b>Deliverable 1:</b> End-June 2017 and end-June 2018</p> <p><b>Deliverable 2:</b> September 2017 and September 2018</p>
7	<p><b>Organisation and delivery of <i>module 1</i></b></p> <p><b>Deliverable 1:</b> Plan of all organisational aspects including all logistical elements (as described in these tender specifications); for agreement with EFSA prior to the commencement of the one week module. It should be noted that this plan should include details of the specific tutors allocated to each specific training topic within the module, this proposal should include the training coordinator – both of which are subject to approval by EFSA.</p> <p><b>Deliverable 2:</b> Actual delivery of module 1 including all operational, logistical aspects as described in these tender specifications. It should be noted that this deliverable also includes the collection of weekly feedback from all training participants and preparation of a summary report to be provided within 5 working days of the end of the one week module, as well as undertaking any necessary follow-up actions based on feedback.</p>	Yes	<p><b>Deliverable 1:</b> estimated September 2017 and September 2018</p> <p><b>Deliverable 2:</b> estimated December 2017 and December 2018</p>

8	<p><b>Organisation and delivery of <i>module 2</i></b></p> <p><b>Deliverable 1:</b> Plan of all organisational aspects including all logistical elements (as described in these tender specifications); for agreement with EFSA prior to the commencement of the one week module. It should be noted that this plan should include details of the specific tutors allocated to each specific training topic within the module, this proposal should include the training coordinator – both of which are subject to approval by EFSA.</p> <p><b>Deliverable 2:</b> Actual delivery of module 2 including all operational, logistical aspects as described in these tender specifications. It should be noted that this deliverable also includes the collection of weekly feedback from all training participants and preparation of a summary report to be provided within 5 working days of the end of the one week module, as well as undertaking any necessary follow-up actions based on feedback.</p>	Yes	<p><b>Deliverable 1:</b> estimated January 2018 and January 2019</p> <p><b>Deliverable 2:</b> estimated March 2018 and March 2019</p>
9	<p><b>Organisation and delivery of <i>module 3</i></b></p> <p><b>Deliverable 1:</b> Plan of all organisational aspects including all logistical elements (as described in these tender specifications); for agreement with EFSA prior to the commencement of the one week module. It should be noted that this plan should include details of the specific tutors allocated to each specific training topic within the module, this proposal should include the training coordinator – both of which are subject to approval by EFSA.</p> <p><b>Deliverable 2:</b> Actual delivery of module 3 including all operational, logistical aspects as described in these tender specifications. It should be noted that this deliverable also includes the collection of weekly feedback from all training participants and preparation of a summary report to be provided within 5 working days of the end of the one week module, as well as undertaking any necessary follow-up actions based on feedback.</p>	Yes	<p><b>Deliverable 1:</b> estimated March 2018 and March 2019</p> <p><b>Deliverable 2:</b> estimated May 2018 and May 2019</p>
10	<p><b>Reporting requirements</b></p> <p><b>Deliverable 1:</b> Draft report at the end of the <u>first</u> 12 month cycle to contain a summary of</p>	Yes	<p><b>Deliverable 1:</b> draft report mid-September 2017</p>

	<p>all feedback obtained at the end of each training event held in the 1<sup>st</sup> cycle, including the minutes of the summer workshop. In addition the report should contain recommendations for the development and improvement of the programme in the medium term. The draft report will be subject to agreement with EFSA.</p> <p><b>Deliverable 2:</b> Final report<sup>9</sup> at the end of the <u>first</u> 12 month cycle to contain a summary of all feedback obtained at the end of each training event held in the 1<sup>st</sup> cycle, including the minutes of the summer workshop. In addition the report should contain recommendations for the development and improvement of the programme in the medium term.</p> <p><b>Deliverable 3:</b> Draft report at the end of the <u>second</u> 12 month cycle to contain a summary of all feedback obtained at the end of each training event held in the 2<sup>nd</sup> cycle, including the minutes of the summer workshop. In addition the report should contain recommendations for the development and improvement of the programme in the medium term. The draft report will be subject to agreement with EFSA.</p> <p><b>Deliverable 4:</b> Final report<sup>10</sup> at the end of the <u>second</u> 12 month cycle to contain a summary of all feedback obtained at the end of each training event held in the 2<sup>nd</sup> cycle, including the minutes of the summer workshop. In addition the report should contain recommendations for the development and improvement of the programme in the medium term.</p>		<p><b>Deliverable 2:</b> final report end-September 2017</p> <p><b>Deliverable 3:</b> draft report mid-September 2018</p> <p><b>Deliverable 4:</b> final report end-September 2018</p>
11	<p><b>Delivery of training modules 2 and/or 3 to EFSA Staff only</b></p> <p>To include completion of all related tasks as described above in these tender specifications.</p>	Yes	To be confirmed in specific contract/order form – foreseen for 2018 and 2019
No	<b>Meetings</b>		<b>Deadline for finalisation</b>
1	<p>Physical kick-off meeting (at EFSA premises in Parma, Italy)</p> <p>Duration 1.5 days<sup>11</sup> to be attended as a minimum by the Project Manager, Event Manager and Scientific Content Manager.</p> <p><b>Deliverable:</b> Following the meeting, the Contractor will be responsible for the preparation of minutes and should provide these within 5 working days of the kick-off meeting.</p>		<b>2 weeks</b> after the entry into force of the contract

<sup>9</sup> The final reports should be a minimum of 5 and maximum of 15 pages A4, not including annexes which should consist of all feedback of participants obtained during each cycle.

<sup>10</sup> See footnote 9.

<sup>11</sup> One meeting day is 8 hours duration. A half-day meeting is four hours duration.

2	Regular telephone conferences between EFSA, the Project Manager and any other project team member, as required.	Estimated weekly
3	Ad hoc physical meetings at EFSA premises in Parma of 1 day duration.	Estimated two annually but to be agreed and ordered as required.
No	<b>Payments</b>	<b>Linked to approval by EFSA of deliverable No</b>
NA	The payment modalities will be described in detail in each order form / specific contract.	NA

The working language for the contract implementation: execution of tasks, meetings and deliverables shall be English.

#### 1.4 INFORMATION ON THE CONTRACT

<b>Type of contract:</b>	framework contract (FWC)
<b>Type of FWC:</b>	single FWC
<b>Nature of expense:</b>	services
<b>Duration of FWC:</b>	one year + automatic renewal twice + non-automatic renewal for one more year with an overall maximum duration of four consecutive years
<b>Budget information:</b>	The financial ceiling available for specific contracts/order forms under the framework contract during an overall maximum period of four consecutive years is <b>700,000 €</b> . A contingency of 10% and possible price indexations are already included in this ceiling.

As regards the mechanism of implementation of the FWC please refer to the [EFSA Guidance for tenderers](#) available at EFSA website.

#### Implementation modalities

Following signature of the framework contract, it is envisaged that the following one-off orders will be placed:

- 1) One order covering attendance at the kick-off meeting
- 2) One order covering preparation of the Induction training materials
- 3) One order covering preparation of Module 1 materials
- 4) One order covering preparation of Module 2 materials
- 5) One order covering preparation of Module 3 materials
- 6) One order covering preparation of Module 3 materials

Additional orders will be placed for each fellowship cycle, organised as follows:

- 1) One order covering organisation and delivery of the summer workshop
- 2) One order covering organisation and delivery of the Induction training
- 3) One order covering organisation and delivery of Module 1
- 4) One order covering organisation and delivery of Module 2

- 5) One order covering organisation and delivery of Module 3
- 6) One order covering organisation and delivery of training modules 2 or 3 to EFSA staff only

All above-mentioned orders may be grouped together in one specific contract or order form depending on the timetable and needs of EFSA at the time of the order. Payment modalities for each order will be set out in the order form or specific contract.

### **1.5 OWNERSHIP AND INTELLECTUAL PROPERTY RIGHTS**

As regards any product or delivery commissioned by EFSA and developed by the Contractor in the context of the contract resulting from this call for tenders, the intellectual property rights will be owned by EFSA only, in its capacity as financial source of the contract. The Contractor cannot file a trademark, patent, copyright or other IPR protection scheme in relation to any of the results or rights obtained by EFSA in performance of the contract, unless the Contractor requests EFSA ex-ante authorisation and obtains from EFSA a written consent in this regard.

In addition, the Contractor selected as a result of the present procurement procedure shall be solely responsible and liable for the following:

- To ensure that terms and conditions asserted by any copyright holder of publications or information referred to in the final deliverables for EFSA are fully satisfied;
- To make the necessary arrangements enabling EFSA to reproduce and make non-commercial use of publications and information referred to in the final deliverable it commissioned. As needed, the Contractor shall consult with copyright licensing authorities (i.e. at national level) for guidance on purchasing copyright licenses to reproduce any publications provided to EFSA. The Contractor remains solely responsible and liable for obtaining all necessary authorizations and rights to use, reproduce and share the publications provided to EFSA

### **PARTS OF RESULTS PRE-EXISTING THE CONTRACT**

If the results are not fully created for the purpose of the contract this should be clearly pointed out in the tender. Information should be provided about the scope of pre-existing materials, their source and when and how the rights to these materials have been or will be acquired.

EFSA does not acquire ownership or any license of pre-existing rights not incorporated in the deliverables. The full ownership is limited to the deliverables, which might include licensed pre-existing rights on excerpts, parts, texts etc., if fully or partially incorporated in the final deliverables.

The draft contract attached in **Annex 3** contains further provisions on ownership of intellectual property rights. All quotations or information the tenderer provides in the technical and financial offer for EFSA which originates from other sources to which third parties may claim rights, have to be clearly marked in the offer in a way allowing easy identification (source publications, including date & place, creator, number, full title etc.). The tenderer shall take account of the above specification on ownership and copyrights in their technical and financial offer.

### **1.6 ADDITIONAL INFORMATION**

#### **Provision of additional services**

By virtue of article 134(1)(e) and article 134(4) of the Rules of Application of the Financial Regulation, EFSA reserves the option to launch further negotiated procedure, with the Contractor chosen as a result of the present call for tender, for new services consisting in the repetition of similar services during the three years following the signature of the original contract. The increase will not go beyond 50% of the original envelope of 700.000 €.

### **Personal data**

Detailed information on the processing of personal data in the context of procurement procedures of EFSA is available in the [Privacy Statement](#) on the EFSA website and in article II.9 of the draft contract, available in **Annex 3**.

## **PART 2 EVALUATION - HOW WILL YOUR OFFER BE ASSESSED?**

In case you decide to apply as a group of economic operators in a joint offer or if your offer envisages the use of subcontractors, please also refer to the [EFSA Guidance for tenderers](#).

### **2.1 OPENING OF OFFERS**

The main aim of the public opening session is to check whether the offer received was dispatched within the closing date for tender receipt and that the tenders are electronically protected until the official opening.

### **2.2 ORDER OF EVALUATION**

Tenderers should note that the content of their offers will be assessed in the following pre-defined order: Eligibility of tenderers (Access to EU Market); Selection criteria (Technical & Professional capacity); Compliance with tender specifications; Award Criteria (Quality and Price).

Following the above assessment and identification of the winning tender, the following will be assessed only for the tenderer proposed for contract award: Selection criteria (Professional Conflict of Interest – Institutional and Individual Declarations of Interest); Exclusion criteria (Declaration on Honour on exclusion criteria); Selection criteria (Declaration on Honour on selection criteria).

### **2.3 GROUNDS FOR EXCLUSION**

The offers declared admissible during the opening session will be further verified against the eligibility and the exclusion criteria.

As regards the eligibility of the tenderers to submit an offer following this call please refer to the [EFSA Guidance for tenderers](#) available on the EFSA website. Only offers from tenderers established in eligible countries will be allowed to the next step of the evaluation.

Tenderers must not be in one of the exclusion situations listed in the [EFSA Guidance for tenderers](#) available at EFSA website.

#### Evidence requested in the offer:

Tenderers must declare that they are not in one of the exclusion situations by providing a signed and dated Declaration on Honour on exclusion criteria, available in **Annex 4**. In case of a joint offer from a group of economic operators, such declaration should be submitted for each member of the group.

EFSA will request further supporting evidence, from the awarded tenderer, prior to the signature of the framework contract. Such requested evidence will be specified in the award letter and will have to be provided to EFSA before the framework contract is signed.

### **2.4 SELECTION CRITERIA**

#### **A) ECONOMIC AND FINANCIAL CAPACITY:**

The tenderer must have the following economic and financial capacity to perform the contract:

- The tenderer must have generated an overall annual turnover of at least 460,000 € in each of the last 2 closed financial years (2014 and 2015).

Evidence requested in the offer:

Tenderers must declare that they fulfil the economic and financial criteria indicated above by providing a signed and dated Declaration on Honour on selection criteria, available in **Annex 5**. In case of a joint offer from a group of economic operators, such declaration should be completed by the leading partner.

EFSA will request further supporting evidence (proof of annual turnover), from the awarded tenderer, prior to the signature of the framework contract. Such requested evidence will be specified in the award letter and will have to be provided to EFSA before the framework contract is signed.

**B) TECHNICAL AND PROFESSIONAL CAPACITY:**

The tenderer must have the technical and professional capacity to perform the contract in accordance with the specifications below. In accordance with article 148(6) RAP<sup>12</sup>, if EFSA, based on the assessment of the technical and professional capacity evidence, concludes that the tenderer has a professional conflicting interest and therefore does not possess the professional capacity to perform the contract to an appropriate quality standard, the tenderer may be rejected.

The tenderer must have the following **minimum professional capacity** to perform the contract:

- a) The tenderer overall must have extensive and demonstrable experience in the coordination of scientific training programmes and;
- b) Ability to provide a pool of **tutors** covering all fields described in annex 8. A minimum of five tutors are required per training week, with an additional two reserve tutors per training week. One Tutor will be assigned as Training Coordinator for each training event. The same tutors can teach in different weeks and modules if they have the necessary expertise. In order to provide an international background to the training, for each training week the tutors must come from at least two different countries and be compliant with these specific expertise requirements:
  - University degree and at least 5 years relevant experience in one of the tutored fields set out in annex 8 and;
  - At least 5 years extensive and demonstrable scientific teaching experience with proven record in academic and/or professional training programmes and;
  - A period of the above described experience must have been undertaken outside the tutors country of origin and;
  - Excellent level of spoken and written standard UK English. For non-native speakers, this should be demonstrated by an Official certificate of English proving a B2 level OR in the absence of an Official certificate, a self-declaration of B2 level as defined in the

---

<sup>12</sup> Commission Delegated Regulation (EU) 2015/2462 on the rule of application of the EU Financial Regulation

European language level – self assessment grid (available [here](#)) OR evidence of at least 3 years of work in an English-speaking environment and;

- c) Ability to provide a **Project Manager** compliant with these specific expertise requirements:
- University degree and at least 5 years relevant experience in one of the tutored fields set out in annex 8 and;
  - At least 10 years extensive and demonstrable management experience in designing, developing, organising and delivering academic/scientific and/or professional training programmes and;
  - Excellent level of spoken and written standard UK English. For non-native speakers, this should be demonstrated by an Official certificate of English proving a B2 level OR in the absence of an Official certificate, a self-declaration of B2 level as defined in the European language level – self assessment grid (available [here](#)) OR evidence of at least 3 years of work in an English-speaking environment and;
- d) Ability to provide an **Event Manager** compliant with these specific expertise requirements:
- University degree and at least 5 years extensive and demonstrable experience in organising and effective running of events in public service academic and/or professional events and;
  - Excellent level of spoken and written standard UK English. For non-native speakers, this should be demonstrated by an Official certificate of English proving a B2 level OR in the absence of an Official certificate, a self-declaration of B2 level as defined in the European language level – self assessment grid (available [here](#)) OR evidence of at least 3 years of work in an English-speaking environment and;
- e) Ability to provide a **Scientific Content Manager** compliant with these specific expertise requirements:
- University degree PhD level and at least 10 years relevant experience in one of the tutored fields set out in annex 8 and;
  - At least 10 years of extensive and demonstrable teaching experience and experience in the design and delivery of academic and/or professional scientific training programmes and;
  - Excellent level of spoken and written standard UK English. For non-native speakers, this should be demonstrated by an Official certificate of English proving a B2 level OR in the absence of an Official certificate, a self-declaration of B2 level as defined in the European language level – self assessment grid (available [here](#)) OR evidence of at least 3 years of work in an English-speaking environment and;

Specific Evidence requested for professional and technical capacity:

<u>For requirement a):</u>	A list of three (3) major relevant projects related to the subject of this assignment carried out in the course of the past five (5) years.
<u>For requirements b) c) d) and e):</u>	Detailed CVs of the Project Manager, Event Manager, Scientific Content Manager and all tutors proposed for the assignment, taking into account the specific expertise requirements detailed above; EFSA strongly recommends submitting the CVs in the EU CV format which can be accessed <a href="#">here</a> .
<p><b>Institutional declaration of interests</b> available in <b>Annex 6</b></p> <p>In case of a group of economic operators submitting an offer and/or in case of subcontracting, such declaration should be completed separately and submitted for each partner and for each identified subcontractor.</p>	
<p><b>Individual declarations of interests</b> available <b>Annex 7</b></p> <p>A separate form to be completed by each member of the proposed project team (including individuals from partner organisations in a joint offer and subcontractors).</p>	

**GENERIC EVIDENCE COMMON FOR ALL SELECTION CRITERIA:**

1	<p><b>Declaration on Honour on selection criteria</b> available in <b>Annex 5</b></p> <p>In case of a joint offer from a group of economic operators and/or in case of subcontracting, the declaration must be included for each partner/subcontractor only if the capacity of those partners/subcontractors is necessary to satisfy those minimum capacity requirements.</p>
2	<p><b>Confirmatory statement of resources</b></p> <p>In case of a joint offer from a group of economic operators and/or in case of subcontracting, the tenderer must provide a statement confirming that they will have at their disposal the resources necessary for performance of the contract by producing a commitment on the part of those entities (i.e. each partner in a joint offer and/or each subcontractor).</p>
3	<p><b>Allocation of tasks between the partners/subcontractors</b></p> <p>In case of a joint offer from a group of economic operators, or in case of subcontracting, the tenderer should provide a statement clearly defining the allocation of tasks between the entities.</p>

Please note, that you do not have to submit any of the above-mentioned evidence if already submitted to EFSA in response to any previous EFSA call, provided the evidence is exactly the same as requested in these tender specifications. If you avail yourself of

this possibility, you have to specify the reference of the EFSA call for tenders under which you have already submitted the evidence to EFSA.

EFSA has the right, during the evaluation process, to request further evidence on the tenderer's compliance with the economic, financial, technical and professional capacity requirements.

## **2.5 COMPLIANCE WITH TENDER SPECIFICATION AND MINIMUM REQUIREMENTS**

Your offer will be assessed for compliance with the tender specifications before its assessment against the award criteria.

Tenders are considered not to comply with the tender specifications and are therefore to be rejected if they:

- do not comply with minimum requirements laid down in the tender specifications (non-compliance);
- propose a solution different from the one that is imposed;
- propose a price above the fixed maximum set in the specifications;
- are submitted as variants, when the specifications do not authorise them;
- do not comply with applicable obligations under environmental, social and labour law established by Union law, national law and collective agreements or by the international environmental, social and labour law provisions listed in Annex X to Directive 2014/24/EU<sup>13</sup>.

In all these cases, the ground for rejection is not linked to the award criteria so there is no evaluation as such. The tenderer will be informed of the ground for rejection without being given feedback on the content of the tender, other than on the non-compliant elements.

## **2.6 AWARD CRITERIA**

Tenders will be evaluated against the below defined award criteria. The award criteria serve to identify the **most economically advantageous offer**.

### **A) QUALITY AWARD CRITERIA**

#### **1. TRAINING METHODOLOGY PROPOSED FOR IMPLEMENTATION (60 points - minimum threshold 50%)**

Tenderers should provide a mock-up of the schedule, demonstrating the tailored way in which they would present the overall content of module 1 as described in annex 8. In addition, the tenderer should provide a detailed presentation of the content for the subject GMO in module 1. The offers will be evaluated as follows:

- a) Appropriate and balanced mix between theory and practical, interactive training sessions ensuring an overall balance of 40-50% theory and 50-60% practical / interactive training sessions for the module indicated above; **20 points**
- b) Suitability of chosen mediums and teaching methods for the presentation of the training content for the target audience; **15 points**
- c) Clarity and comprehensiveness of the proposed materials and methodology for presentation; **15 points**

---

<sup>13</sup> OJ L 94 of 28.03.2014, p. 65

- d) Logical and structured step by step explanation of training methodology; **10 points**

**2. PROJECT MANAGEMENT PROPOSED FOR IMPLEMENTATION (20 points)**

Tenderers should provide a detailed explanation on the project management strategies they will put in place in order to manage the implementation of the project overall. The description should cover project management of the logistical aspects of the project as well as project management of the training events. The offers will be evaluated as follows:

- a) The provision of a dedicated contact point for EFSA with clearly defined channels of communication; **5 points**
- b) Clear and detailed information on distribution of the tasks among the project team, including amongst the tutors; in case of joint offers and/or use of subcontractors, clarity on who does what, when and why (justify why the partner/subcontractor is proposed to do the particular task); **5 points**
- c) The provision of a clear and detailed strategy for providing back-up tutors and other key project team members in the event of unforeseen circumstances; **10 points**

**3. MEASURES TO GUARANTEE QUALITY OF DELIVERABLES (20 points)**

Tenderers should provide a detailed explanation of how they intend to ensure the quality of all/each of the deliverables for this project. The description should cover measures to guarantee the quality of the logistical aspects of the project as well as the training events. The offers will be evaluated as follows:

- a) Role of Project Manager in quality assurance; **5 points**
- b) Efficiency and effectiveness of the processes proposed to measure and ensure the quality of the deliverables, including content and teaching methods as well as the organizational and logistical aspects; to obtain feedback from all participants; to ensure appropriate updates / changes to the training materials and overall organization of the programme; **15 points**

**The sum of all quality award criteria gives a maximum possible total of 100 points.**

The tenderer shall elaborate in the technical offer on all points addressed in the technical specifications, bearing also in mind the above indicated award criteria, in order to score as many points against the quality award criteria as possible. The mere repetition of mandatory requirements set out in the technical specifications, without going into detail or without giving any added value in the technical offer, will only result in a very low score.

Offers must score at least 50% for criterion number one, and at least 80% of maximum possible total points against the quality award criteria.

Tenders that do not reach these minimum quality thresholds will be eliminated from the subsequent stages of the evaluation process.

**B) PRICE AWARD CRITERION:**

Tenders which passed the above quality thresholds will be retained for the further assessment of the following:

- I. the price offer is made within the maximum budget for financial offers indicated in the tender specifications and;
- II. the financial offer satisfies the formal requirements of the tender specifications.

**C) THE BEST PRICE-QUALITY RATIO:**

The tenders for which the financial offers were made within the maximum budget for financial offers and satisfied the formal requirements indicated in the tender specification will be retained for the identification of the tender with the best price-quality ratio based on the formula:

$$\begin{aligned} & \text{BEST PRICE – QUALITY RATIO (BPQR)} \\ & = \\ & \text{[CHEAPEST PRICE / PRICE OF TENDER X] * PRICE WEIGHTING 30\%} \\ & + \\ & \text{TOTAL QUALITY SCORE (OUT OF 100) FOR ALL QUALITY AWARD CRITERIA OF} \\ & \text{TENDER X / 100 * QUALITY AWARD CRITERIA WEIGHTING 70\%} \end{aligned}$$

## **PART 3** CONTENT OF THE OFFER – HOW TO SUBMIT YOUR OFFER & WHAT SHOULD YOUR OFFER CONSIST OF?

### **SUBMISSION GUIDELINES**

- You should submit your tender electronically via the e-Submission application in one of the official languages of the European Union through the e-tendering website and before the closing date for offer receipt as described in the Invitation Letter. Please also refer to the e-submission application description attached in **Annex 2**.
- In order to familiarise yourself with the system and to test whether your workstation configuration is working correctly with our environment, you are invited to access the following test environment at:  
[https://webgate.ec.europa.eu/supplier\\_portal\\_toolbox/spots/openSpots.do?CFT\\_UUID=TEST\\_CFT\\_2016-NO\\_LOTS&VERSION=1&CAID=5790001791483&screenWidth=1000&screenHeight=850](https://webgate.ec.europa.eu/supplier_portal_toolbox/spots/openSpots.do?CFT_UUID=TEST_CFT_2016-NO_LOTS&VERSION=1&CAID=5790001791483&screenWidth=1000&screenHeight=850)

This will enable you to make a test submission well in advance of the time limit for receipt indicated in the Invitation letter.

**E-Submission application:** The tenderer must provide the following information using the e-Submission application. In the e-submission application, please fill in all mandatory fields (marked with a star \*) and other fields as appropriate. All tenders must be clear, complete and consistent with all the requirements laid down in the tender specifications including the below instructions. The documentary evidence/documents required in the tender specifications must be included in section "Qualification" in the e-submission application. Tenders not including the necessary evidence may be rejected.

### **Step by step guide:**

#### **STEP: ACCESS e-submission**

In order to access the e-Submission application, the first step is to create a user account in the system (European Commission Authentication System - ECAS):  
<https://ecas.ec.europa.eu/cas/eim/external/help.cgi>

A button "Submit your Tender" will then be displayed and you will be able to access the e-Submission application.

Before proceeding to fill in the tender details in the system, you need to accept the Terms & Conditions and acknowledge the Privacy Statement of the e-Submission application.

#### **STEP: Welcome to the tender wizard**

Please read the recommendations and instructions.

You can either create a tender for the first time or load a draft tender from your local disk if not created for the first time. In case of doubts refer to user Manual and FAQs:

- [https://webgate.ec.europa.eu/supplier\\_portal\\_toolbox/spotsHelpPage.jsp](https://webgate.ec.europa.eu/supplier_portal_toolbox/spotsHelpPage.jsp)

In case of technical problems only, contact DIGIT Helpdesk indicated in the e-submission application at [DIGIT-ESUBMISSION-SUPPORT@ec.europa.eu](mailto:DIGIT-ESUBMISSION-SUPPORT@ec.europa.eu) or call +32 2 29 58 181

## STEP: e-submission wizard step 2 of 5 - TENDERING DATA

### **Different ways to submit a tender:**

Options 1 to 4 below describe the different ways to submit a tender. Please make sure all required documents and evidence are submitted with your tender.

**Option 1:** Submission by one tenderer: "single tender" in the e-submission application.

**Option 2:** Submission by a group of economic operators: "joint tender" in the e-submission application. In case of a (joint tender) one member of the group must be designated as lead partner ("leading partner" in the e-submission application).

**Option 3:** Submission by one tenderer with subcontractors: "single tender; involving subcontracting" in the e-submission application.

**Option 4:** Submission by a group of economic operators (joint tender) with subcontractors: "joint tender; involving subcontracting" in the e-submission application.

## STEP: e-submission wizard step 3 of 5 - TENDERING DATA

No action for tenderers; text for information only.

## STEP: e-submission wizard step 3 of 5 - QUALIFICATION: IDENTIFICATION OF THE TENDERER

**1. "Legal Entity Form":** In order to prove their legal status, the single tenderer or leading partner in a joint offer must provide a Legal Entity Form (LEF) with its supporting evidence. Subcontractors are not required to provide this document. In case of a joint offer, each partner must fill in and upload a Legal Entity Form (LEF) with its supporting evidence under the section "Qualification" -> "Identification of the tenderer" under "Documents".

Hand written signature of individual forms of the single tenderer or leading partner in a joint offer who submits the tender is not required, since the signature of the Tender Preparation Report implies that all included documents are signed by them.

The standard template of the Legal Entity Form in each EU language is available at: [http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/legal\\_entities/legal\\_entities\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm)

**2. "Administrative Identification Form":** This form should be completed by the tenderer using the template available in **Annex 9**, in case of a joint offer, only by the leading partner and needs to be filled in and uploaded under "Qualification" -> "Identification of the tenderer" under "Documents".

**3. "Financial identification Form":** The tenderer (single tenderer or leading partner in case of joint tender) must provide a Financial Identification Form (FIF) and supporting documents. Only one form per tender should be submitted (no form is needed for subcontractors and other partners in a joint offer). The form is available on:

[http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/financial\\_id/financial\\_id\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm)

The form needs to be printed, filled in and then scanned and uploaded in the section "Qualification" -> "Identification of the tenderer" -> "Documents".

Hand written signature of individual forms of the single tenderer or leading partner in a joint offer who submits the tender is not required, since the signature of the Tender Preparation Report implies that all included documents are signed by them.

#### STEP: e-submission wizard step 3 of 5 - QUALIFICATION: EXCLUSION CRITERIA

For the exclusion criteria the tenderer is requested to submit the following evidence:

- Declaration on honour on the exclusion criteria by the tenderer using the template available in **Annex 4**, in case of a joint offer by each partner, relating to the exclusion criteria (see section 2.3) needs to be filled in and uploaded under "Qualification" -> "Identification of the tenderer" -> "documents".

The hand written signature of the form is required for the single tenderer or in case of joint offers, by each member of the group, including the leading partner.

#### STEP: e-submission wizard step 3 of 5 - QUALIFICATION: SELECTION CRITERIA – ECONOMIC AND FINANCIAL CAPACITY

##### **Generic Evidence for selection criteria:**

Declaration on honour on the selection criteria by the tenderer using the template available in **Annex 5**, in case of a joint offer, only by the leading partner (see section 2.4A) needs to be filled in and uploaded under "Qualification" -> "Selection Criteria -> "Financial and Economic Capacity" in the e-Submission application.  
<http://www.efsa.europa.eu/en/procurement/toolbox>

The hand written signature of the form is required for the single tenderer or in case of joint offers, by the leading partner.

#### STEP: e-submission wizard step 3 of 5 - QUALIFICATION: SELECTION CRITERIA – TECHNICAL AND PROFESSIONAL CAPACITY

##### **Specific Evidence for technical and professional capacity:**

The tenderer is requested to upload the proof of technical and professional capacity (see 2.4B) in section "Qualification" -> "Selection Criteria" -> "Technical and Professional Capacity" in the e-Submission application.

#### STEP: e-submission wizard step 3 of 5 - QUALIFICATION: tender

---

**Technical offer:** The technical tender needs to be uploaded in the section "Tender" in the e-Submission application. The tenderer will need to select the "Technical Tender" document from the dropdown box ("Financial Tender or Technical Tender"). The e-Submission application allows attachment of as many documents as necessary.

This technical section is of great importance in the assessment of the offers, the award of the contract and the future execution of any resulting contract.

The technical offer must cover all aspects required in the technical specifications and provide all the information needed to reply to the quality award criteria (see section 2.6 A).

Offers deviating from the minimum requirements or not covering all minimum requirements will be excluded on the basis of non-conformity with the tender specifications and will not be evaluated (see section 2.5).

**In case of subcontracting:** please indicate in the technical offer the % proportion of subcontracting.

---

**Financial offer:** The complete financial offer (according to the form available in **Annex 1**) needs to be uploaded in section "Tender" in the e-Submission application. The tenderer will need to select the "Financial Tender" document from the dropdown box ("Financial Tender or Technical Tender").

**Fields: "Tax Exclusive amount", "Tax total", "Total Payable":** The total price of the tender needs to be encoded in the e-Submission application. Please indicate the **total price** of the Financial offer template (**Annex 1**) in the fields "Tax exclusive amount" and "Total payable". In the field "Tax total" please indicate "0"/Zero value.

### STEP: e-submission wizard step 3 of 5 – validation

To continue to step 4, please click on "**Validate**" button. A **tender preview document** will be generated in your local computer.

### STEP: e-submission wizard step 4 of 5 – Consolidate tender docs – finalize package

Once all information and documents have been encoded and uploaded in the e-Submission application and you consider that the tender is complete, the application will require you to consolidate the tender into one consolidated tender package. A Tender Preparation Report will be generated by the e-Submission application. The application will require you to save both files (i.e. the consolidated tender package and the Tender Preparation Report) on your local computer.

The Tender Preparation Report must be signed ONLY in the following way:

**Hand signature:**

You print out the Tender Preparation Report. The single tenderer's or lead partner's authorised representative(s) should hand sign the Tender Preparation Report. Upon signature, you will upload the scanned, signed document in the e-Submission application. **The tender (including the scanned copy of the Tender Preparation Report) needs to have been uploaded within the "Receipt Time Limit - Closing date and time for offers reception" indicated in the Invitation letter.**

---

---

The signature of the single tenderer's or lead partner's authorised representative(s) on the Tender Preparation Report will be considered as binding with respect to the terms of the tender.

**Both (i) the consolidated tender package; and (ii) the scanned hand signed Tender Preparation Report need to be uploaded into the e-Submission application.**

### STEP: e-submission wizard step 5 of 5 – SUBMITTING YOUR TENDER

The scanned, signed Tender Preparation Report should also be sent immediately after submission, to this **e-mail address: [EFSAProcurement@efsa.europa.eu](mailto:EFSAProcurement@efsa.europa.eu)**.

**You will receive a tender receipt confirmation in your e-Submission mailbox, including information about the **timestamp** put on your tender by the e-Submission system. This is considered as the official time of receipt and will constitute proof of compliance with the deadline given in the invitation letter. Late receipt will lead to the exclusion from the evaluation procedure for this contract.**

---

#### IMPORTANT:

**1. Make sure you submit your tender on time:** You are strongly advised to start completing your tender early. Do not wait until the last day to upload your offer. To avoid any complications with regard to late receipt/non receipt of tenders within the deadline, please ensure that you submit your tender **well in advance of the deadline**. In case of any problems with the submission of the electronic tender, you must call the helpdesk a reasonable amount of time before the time limit for receipt. The time it takes to submit the tender and upload all your documents may vary considerably depending on the number of concurrent submissions by other economic operators, the size of your tender and the type of internet service you are using.

**Please note that the responsibility rests with you to ensure that your tender is correctly uploaded before the time limit for receipt.**

**2.** After submitting a tender, but within the time limit for receipt, you may still submit a new version of your tender. To do this, you should upload a new consolidated tender package containing corrected tender documents together with formal notification by letter that the previous tender is withdrawn.

**3.** If, after submission, you wish to withdraw your tender, you must send a duly signed letter to this **e-mail address: [EFSAProcurement@efsa.europa.eu](mailto:EFSAProcurement@efsa.europa.eu)** identifying the name and reference of the tender you wish to withdraw. This notification must be signed by the same authorised legal representative(s) who previously signed the tender in question.

---

## **ANNEX 1 - FINANCIAL OFFER**

Tenderers are requested to use the **Excel template** for drawing up their financial offer which is uploaded in e-Tendering with all other procurement documents.

## ANNEX 2 – E-SUBMISSION APPLICATION DESCRIPTION

### What is the e-Submission application?

The e-Submission application allows economic operators to respond to Call for tenders by preparing their Tenders electronically in a structured and secured way, and submitting their tenders electronically. The TED e-Tendering is the starting point for launching the e-Submission application.

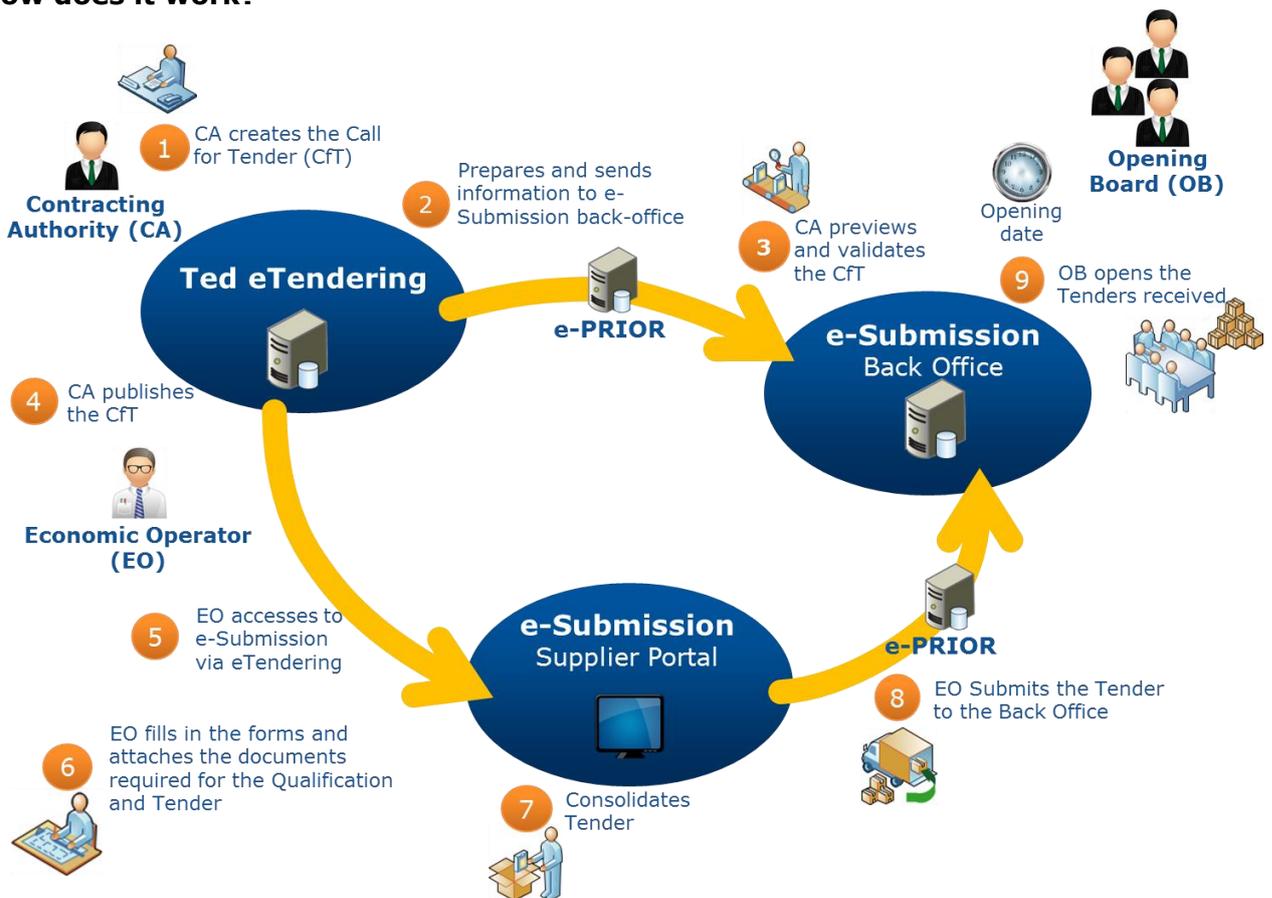
On the Contracting Authority side, this application is responsible for generating the necessary templates and encryption key, and to securely open the received tenders.

As an economic operator you can:

- Prepare, save and load your tender.
- Submit your tender electronically and securely.
- Receive a proof of tender submission
- View the tenders to which you have applied.

Your submitted tender(s) will be received by the corresponding Contracting Authority who will be able to open your electronic tender during the opening session.

### How does it work?



1. The Call for Tender (CfT) is first created in TED e-Tendering by the Contracting Authority (CA).
2. The CA then enables e-Submission. This will allow Economic Operators (EO) to submit tenders via e-Submission once the CfT is published.
3. The CA can preview the CfT as it will be seen by the EO.
4. When the CfT is ready the CA publishes the CfT.
5. When the EO wants to submit a tender, the EO accesses to e-Submission via TED e-Tendering.
6. Fills in the required information and documents for his Tender.
7. When the Tender is ready the EO creates a "virtual package" (consolidate) of his Tender to prepare it for submission.
8. The EO then submits his Tender to the CA which is received by e-Submission Back Office.
9. On the Opening date, the Opening Board gathers and opens all received e-Tenders on the e-Submission Back Office.

**Where to find more information?**

[https://webgate.ec.europa.eu/supplier\\_portal\\_toolbox/spotsHelpPage.jsp](https://webgate.ec.europa.eu/supplier_portal_toolbox/spotsHelpPage.jsp)

**ANNEX 3 - DRAFT CONTRACT**

Tenderers should note that in the event that their offer is successful, the resulting contract will be based on the model annexed to these tender specifications.

**ANNEX 4 – DECLARATION ON HONOUR ON EXCLUSION CRITERIA**

**ANNEX 5 - DECLARATION ON HONOUR ON SELECTION CRITERIA**

**ANNEX 6 – INSTITUTIONAL DECLARATION OF INTERESTS**

**ANNEX 7 – INDIVIDUAL DECLARATION OF INTERESTS**

**ANNEX 8 – MINIMUM REQUIREMENTS FOR TRAINING CONTENT**

**ANNEX 9 – ADMINISTRATIVE IDENTIFICATION FORM**

**All templates are uploaded in e-Tendering with all other procurement documents.**