Call for tenders TAXUD/2016/AO-02  
ITSM3 - Integration

Questionnaire

**Name of Tenderer:** [*insert name of Tenderer*]

**Tender form**

Please give brief replies and/or references.

Single legal person or company

□ The offer is submitted by **a sole tenderer**. If applicable, please specify below:

Company:

Joint offers

Check one of the boxes below as appropriate:

□ The offer is a joint offer submitted by **a tendering group**. Please specify below:

The **name of the tendering group** :

Company acting as **main point of contact** for the tendering group:

**Other companies** taking part in the joint offer:

*Company n° 1*

*Company n° 2*

*Company n° …*

* For this tendering group, does a consortium or a similar entity already exist?

□ YES. Please make sure that the offer contains further information to this effect.

Reference:

□ NO. Please note that, in case of award, the Commission may require the formal constitution of a consortium.

**Subcontracting**

Check one of the boxes below as appropriate:

□ The offer **does not foresee subcontracting** of activities.

□ The offer **foresees subcontracting of activities**;

In case of subcontractors being natural persons (e.g. freelancers), these subcontractors should not be listed by their name but be referred to as “subcontractor – freelancer 1”, “subcontractor – freelancer 2”, and so on. Please also refer to section 6.3.4 of Annex 4 to the Tendering Specifications: Guidebook for Tenderers concerning the protection of personal data. All other relevant information will have to be provided under section 4.3.3 and Attachments 2 and 4 of this questionnaire.

List of subcontractors:

*Subcontractor n°1 – proportion of the contract that will be subcontracted and description of tasks that will be subcontracted*

*Subcontractor n°2 – proportion of the contract that will be subcontracted and description of tasks that will be subcontracted*

*Subcontractor n°… – proportion of the contract that will be subcontracted and description of tasks that will be subcontracted*

If a sole tenderer or a tendering group intends also to rely on the economic and financial capacity of the subcontractor(s), the subcontractor(s) also have to fill in Section 3 (except bullet point 4).

Please make sure that the offer contains a document clearly stating the identity, roles, activities and responsibilities of the subcontractor(s), the estimated value as well as the reasons why subcontracting is foreseen.

Reference:

**Subcontractor(s) must submit a letter of intent to collaborate as subcontractor(s) in the call for tenders TAXUD/2016/AO-02.**

To assess whether or not the tenderer is in a situation of subcontracting, please take the following into consideration:

* **Subcontracting** is the situation where a contract has been or is to be established between the Commission and a contractor and where **the contractor, in order to carry out that contract, enters into legal commitments with other legal entities** for performing part of the work, service or supply. However, the Commission has no direct legal commitment with the subcontractor(s).
* **Freelancing**, drawing on the activities of staff of any other entirely different legal entity than the contractor, independently of its exact legal form (and independently of the applicable national law) **does qualify as subcontracting**.
* One-person companies (or freelancers) may be authorised as subcontractor and added to the list of subcontractors.
* In his offer submitted in reply to the call for tenders, a sole tenderer or a tendering group is only allowed to subcontract to the company(ies) listed above as subcontractor(s).
* Please fill the Attachment 2 with the names of the freelancers proposed in your offer.
* Freelancers shall submit a letter of intent to collaborate as subcontractors in the call for tenders TAXUD/2016/AO-02.

**Electronic Copy**

Please refer to section 6.3.5.2 of the Guidebook for tenderers.

□ an electronic copy of the complete offer, including the duly completed price table and duly completed questionnaire, is enclosed.

Reference:

# Questions relating to the identification of the Tenderer

## ONLY FOR A SOLE TENDERER

### Name of tenderer

### Legal form of company

### Date of registration

### Country of registration

### Registration number

### VAT number

### Registered address of company

### Usual administrative address of company

### Person(s) authorised to sign contracts (together or alone) on behalf of the company [Surname, first name, title (e.g. Dr, Mr, Mrs…), function (e.g. Manager…)]

### Contact person for this call for tenders [Surname, first name, title (e.g. Dr, Mr, Mrs…), function (e.g. Manager…) Telephone number, fax number, address and e-mail]

Contact person:

### Legal entity form

Please print, fill in and sign a legal entity form (Annex 6 to the Tendering Specifications) for each member of the tendering group (including each subcontractor if any). The form is proposed in English. However, if you need the form in any other EU official language, it is available for downloading at the following website:

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

Please read the instructions stated on the website before filling in the document.

Please make sure that the legal entity form is dated and signed.

Reference to the legal entity form:

### Financial identification form

Please print, fill in and sign a financial identification form (Annex 7 to the Tendering Specifications) for each member of the tendering group. The form is proposed in English. However, if you need the form in any other EU official language, it is available for downloading at the following website:

<http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm>

Please read the instructions stated on the website before filling in the document.

Please make sure that the financial identification form is dated and signed by both the bank and the account holder.

Reference to the financial identification form:

## ONLY FOR MEMBERS OF A TENDERING GROUP[[1]](#footnote-2)

### Specify the company name.

Acting as:

□ main point of contact for the tendering group

□ member of the tendering group

### Legal form of company

### Date of registration

### Country of registration

### Registration number

### VAT number

### Registered address of company

### Usual administrative address of company

### Person(s) authorised to sign contracts (together or alone) on behalf of the company [Surname, first name, title (e.g. Dr, Mr, Mrs…), function (e.g. Manager…)]

### Contact person for this call for tenders [Surname, first name, title (e.g. Dr, Mr, Mrs…), function (e.g. Manager…) Telephone number, fax number, address and e-mail]

### Legal entity form

Please print, fill in and sign a legal entity form (Annex 6 to the Tendering Specifications) for each member of the tendering group (including each subcontractor if any). The form is proposed in English. However, if you need the form in any other EU official language, it is available for downloading at the following website:

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

Please read the instructions stated on the website before filling in the document.

Please make sure that the legal entity form is dated and signed.

Reference to the legal entity form:

### Financial identification form

Please print, fill in and sign a financial identification form (Annex 7 to the Tendering Specifications) for each member of the tendering group. The form is proposed in English. However, if you need the form in any other EU official language, it is available for downloading at the following website:

<http://ec.europa.eu/budget/contracts_grants/info_contracts/financial_id/financial_id_en.cfm>

Please read the instructions stated on the website before filling in the document.

Please make sure that the financial identification form is dated and signed by both the bank and the account holder.

Reference to the financial identification form:

### Power of attorney:

In case of a joint offer, please fill in and sign a power of attorney designating one of the companies of the tendering group as leader and giving a mandate to it (Annex 8 to the Tendering Specifications).

## ONLY FOR SUBCONTRACTORS[[2]](#footnote-3) (OF A SOLE TENDERER OR TENDERING GROUP)

### Name of the subcontractor

### Legal form of company

### Date of registration

### Country of registration

### Registration number

### VAT number

### Registered address of company

### Usual administrative address of company

### Legal entity form

Please print, fill in and sign a legal entity form (Annex 6 to the Tendering Specifications) for each subcontractor. The form is proposed in English. However, if you need the form in any other EU official language, it is available for downloading at the following website:

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

Please read the instructions stated on the website before filling in the document.

Please make sure that the legal entity form is dated and signed.

Reference to the legal entity form:

# Exclusion of the Tenderer

**This section must be completed by all companies including subcontractors.**

Please refer to section 9.1 of the Guidebook for tenderers.

Have you enclosed all the elements requested in the table below? Complete accordingly the “Yes/No” and reference boxes with regard to each requested entry.

|  |  |  |
| --- | --- | --- |
| You must enclose: |  |  |
| 1. Declaration of honour on exclusion criteria and selection criteria (Annex 5 to the Tendering Specifications). | Yes/No | Reference: |

# Selection of the Tenderer / economic and financial capacity

**This section must be completed by all companies except subcontractors[[3]](#footnote-4).**

Please, refer to section 9.2.1 of the Guidebook for tenderers.

Have you enclosed all the elements requested in the table below? Complete accordingly the “Yes/No” and reference boxes in regard to each requested entry.

|  |  |  |  |
| --- | --- | --- | --- |
| You must enclose: |  | |  |
| 1. Evidence on a professional risk indemnity insurance valid at the time of submission of the offer ; | Yes/No | | Reference: |
| 2. Balance sheets and results for at least the last two financial years for which accounts have been closed; | Yes/No | | Reference: |
| 3. If not, equivalent documentation; | Yes/No | | Reference: |
| 4. A statement of the overall turnover and the turnover related to the scope of the contract, during each of the last three financial years, which establish that they are equal or superior to 12 EUR and 6 EUR respectively. In the case of a tendering group, the turnover figures will be assessed at the level of the tendering group and not in relation to each individual member of the tendering group | Yes/No | | Reference: |
| 5. Do you intend to rely on the capacities of other entities (e.g. your parent company, subcontractor) to meet the criteria concerning the economic and financial capacity? | Yes/No | | |
| 6. If yes, provide a declaration from this other entity stating that it will fully support your company during the execution of the contract. | Yes/No | Reference: | |

# Selection of the Tenderer / technical and professional capacity

**In case of a joint offer, this section has to be completed on behalf of the tendering group.**

Please refer to section 9.2.2 of the Guidebook for tenderers and section 5.3 of the Tendering Specifications.

Tenderers are required to prove that they have sufficient technical and professional capacity to provide the services described in the Tendering Specifications.

Any answer different from "YES" given to questions marked "mandatory" will result in non-selection. Note that the commitments of the tenderers will be translated into contractual terms and could therefore bring the application of liquidated damages in cases of non-compliance.

## Response requirements

Tenderers must:

* demonstrate their ability to provide suitably qualified consultants on request;
* demonstrate the suitability of their quality environment and quality procedures to facilitate correct provision of the required services.

The tenderers must indicate their methods, infrastructure, tools and ways of facilitating the identification of suitable consultants, as mentioned in section 9.1 of the Technical Annex.

Failure to comply with these requirements in the tender will result in non-selection.

## Vision, strategy and service culture

In case of a joint offer, provide the information on behalf of the whole tendering group.

|  |  |  |
| --- | --- | --- |
| Have you provided a description of your vision, strategy and service culture with regard to the type of services falling to the scope of the contract?  (max 5 pages) | Yes/No | Reference: |
| Have you listed what you consider the key success factors for the provision of the services that you offer currently to the market with regard to the deliveries and services of the contract and provided a description of your strategic approach to address them?  (max 5 pages) | Yes/No | Reference: |
| Have you provided the service catalogue that you offer currently to the market with regard to the deliveries and services to be covered by the contract? | Yes/No | Reference: |

## Organisation of the tenderer to allow the delivery of the required services

In the case of a joint offer, provide the information for each company.

### Tenderer’s structure

Have you provided a description, supported by a structured chart, of your organisational structure detailing the departments and allocated number of staff on all levels of your company(ies), as well as the division(s) responsible for the delivery of services requested in the present call for tenders ?

YES/NO (mandatory)

Reference:

Have you provided the locations of your organisation and indicated future plans?

YES/NO (mandatory)

Reference:

Have you enumerated all functions in the table below which are involved in provisioning the catalogue of services covering the scope of the contract, including the ones involved in quality control and quality assurance ?

YES/NO (mandatory)

|  |  |
| --- | --- |
| **Functions** | **Reference to the enclosed function description** |
| **Add as many as needed** |  |
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Have you enclosed a description of each of these functions along with their reference in the table above?

YES/NO (mandatory)

In case of consortium and/or subcontracting, have you clearly defined the respective responsibilities of each involved party, the relation between them, and the governance which will guarantee the integrity of the services provided?

YES/NO (mandatory)

Reference:

### Technical knowledge management

Do you have technical knowledge base(s) relevant to the delivery of the requested services?

YES/NO (if YES, include the name used internally by the tenderer for this technical knowledge base):

#### If YES,

Indicate the person(s) responsible for this technical knowledge base: surname, first name, title (e.g. Dr, Mr, Mrs, Miss, Ms…), function (e.g. Manager…), telephone number, fax number, address, e-mail.

Describe the functioning of the technical knowledge base(s) (how information is entered, how the information can be consulted, where the information is stored, how the quality of the information is guaranteed):

Reference:

How does the tenderer provide access for his staff to this technical knowledge base(s)?

Reference:

#### If NO, how do you guarantee the availability of information relevant to the technical knowledge for the services required?

Reference:

### Training Centre

Do you have training programme(s) that support(s) the quality of the services required?

If YES, indicate the person(s) responsible for maintaining the training programme: surname, first name, title (e.g. Dr, Mr, Mrs, Miss, Ms…), function (e.g. Manager…), telephone number, fax number, address, e-mail.

Reference:

Give an overview of the courses in the training programme(s) by providing for each course the following information (for technical training only in relation with the profiles requested) – extend this table as required:

|  |  |  |  |
| --- | --- | --- | --- |
| Course reference code | Course name | Company / institute organising the course | Course table of contents |
|  |  |  |  |
|  |  |  |  |

If NO, how do you guarantee the training programme and the staff competence that supports the quality of the services required?

Reference:

### Segregation of duties

## If you are involved - even partially - in an existing contract with DG TAXUD, have you provided the detail of the steps to ensure a strict segregation of duties at the management, control, quality assurance and operational levels?

YES/NO (mandatory)

Reference:

## Tenderer manpower and qualification of staff relevant to the required services

In the case of a joint offer, the required information should be provided for the tendering group as a whole.

Note that staff of subcontractors is considered as non-permanent staff.

Please note that only staff with a direct, individual, regular and unlimited working contract with the tenderer can be quoted as “permanent” staff.

1. In the case of a tendering group, the quantities mentioned below will apply at the level of the tendering group and not on an individual basis.
2. Staff with a personal contractual relationship with a company of another nature or without a personal contractual relationship to it (e.g. free-lancers, staff from affiliated companies or from subcontractors) shall only be quoted as non-permanent staff.
3. In the case that a branch-company responds in the name of a group, a written endorsement of the group is necessary with the names of all affiliated companies that participate effectively.

### Staffing table

Complete the following staffing table:

| Total annual manpower | 2013 | 2014 | 2015 | Current numbers | 2015 staff turnover % |
| --- | --- | --- | --- | --- | --- |
| **Average annual manpower** | | | | |  |
| Permanent staff |  |  |  |  |  |
| Non-permanent staff |  |  |  |  |  |
| ***Total*** |  |  |  |  |  |
| **Average number of managerial staff (only permanent staff)** | | | | |  |
| Permanent staff |  |  |  |  |  |
| **Average number of staff allocated to tasks falling in the scope of Service Blocks 1 to 9** | | | | |  |
| Permanent staff |  |  |  |  |  |
| Non-permanent staff |  |  |  |  |  |
| ***Total*** |  |  |  |  |  |

### Profile availability

* Indicate in the following table the number of staff assigned in 2015 per profile involved in the provisioning of the catalogue of services which cover the scope of the contract. Each profile includes its level of seniority in its name according the following set:
* Novel: between 1 and 2 years of experience;
* Junior: between 3 and 4 years of experience;
* Medium: between 5 and 7 years of experience;
* Senior: 8 or more years of experience.

As an example, a Junior Architect, a Medium Architect and a Senior Architect are 3 distinct profiles in the context of the call for tenders. All profiles must be the same as those referred to in question 5.2. below and in the price table.

The **ITSM3** **Integration** contractor should **not** include CVs in his tender. It will be the responsibility of the **ITSM3 Integration** contractor during the execution of the contract to demonstrate for each person proposed in the context of a Specific Contract or RfA that he/she meets the specification(s) of the profile as proposed in his tender.

| Profile(s) | Total Permanent | Total non-permanent | Total |
| --- | --- | --- | --- |
| Add as many as considered necessary |  |  |  |
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## References in relation to similar projects/contracts

### Project References

Enclose project reference forms using the attached template (the use of this standardised form is mandatory – see Attachment 1).

It is mandatory to enclose a completed Project Reference Form (see Attachment 1) for each of 3 (no more, no less) recent (contracts executed in 2013, 2014 or 2015) integration management projects in the area of the required services, each of them having been carried out for a different organisation.

The minimum size of the projects must be 4 million €/year.

Departments, divisions, directorates, etc. are regarded as the same organisation. For example, a specific European Institution or ministry or company is considered as one organisation.

A framework contract with different specific contracts must be considered as a single reference.

Projects performed for a parent company, partner organisation(s), subsidiary(ies), branch(es), department(s), division(s), directorate(s), etc. of the tenderer (whether it is a sole tenderer or a tendering group), cannot be submitted as project references.

The tenderers who do not comply with the requirements will be judged as not having the minimum technical capacity to deliver the required services.

## Quality assurance and control mechanisms

(In case of a joint offer, the required information should be provided for each company.)

### Compliance with ISO standards or equivalent

|  |  |  |
| --- | --- | --- |
| Have you provided certificates of compliance for each of the relevant organisational entities that you propose to be involved in the delivery and service provision for this contract: | Yes/No |  |
| ISO standard (or equivalent, to be specified) | Yes/No | Reference: |
| ISO 20000-2:2005 |  |  |
| ISO 27001.2005 |  |  |
| ISO 27002.2005 |  |  |
| ISO 9000 |  |  |
| Others (add as necessary) |  |  |

### 

### Maturity level

|  |  |  |
| --- | --- | --- |
| * Have you provided a recent and dated report of maturity scan/measurement of the processes of relevance for the deliverable and services provision for this contract ? | Yes/No | Reference: |
| * If yes, have you provided the reference to the method used to measure this maturity level ? | Yes/No | Reference: |

### Methodology

Have you provided all the elements requested in the table below? Fill accordingly the “Yes/No” and reference boxes in regard of each requested entry.

| The tenderer must provide: |  |  |
| --- | --- | --- |
| * A description of the methods and standards that he relies on to offer the services in his catalogue | Yes/No | Reference: |
| * A description of the processes that he relies on to offer the services in his catalogue | Yes/No | Reference: |
| * A description of his system for quality management, quality assurance and continuous improvement | Yes/No | Reference: |
| * A description of his system for risk & security management | Yes/No | Reference: |
| * A description of the control mechanisms that he intends to put in place to ensure the quality of the services | Yes/No | Reference: |

#### Please ensure that you have provided the title and contents list of your relevant manuals.

# Award criteria

**In case of a joint offer, this section has to be completed on behalf of the tendering group.**

Note that the Commission will NOT consider, during the technical evaluation, any part of the tender which would have been “Copied and Pasted” from the Technical Annex or any other documents provided by the Commission to specify its requirements for this call for tenders.

*a) Offers will have to score at least* ***60%*** *for each individual award criterion.*

**AND**

*b) Offers will have to reach an overall score of at least 600 points (out of 1000).*

## Fitness of the proposed approach and strategy to implement requirements and foreseen activities (50% weight for the technical evaluation)

Have you provided all the elements requested in the table below? Complete accordingly the “Yes/No” and reference boxes in regard to each requested entry.

|  |  |  |
| --- | --- | --- |
| The tenderer must provide: |  |  |
| * His understanding of the requirements of the contract, including his understanding of the evolution of the demand in line with the expected growth of operation | Yes/No | Reference: |
| * His strategy to meet the quality and quantity of **all** the services required over the duration of the contract. | Yes/No | Reference: |
| * A demonstration of how the proposed strategy will be delivered | Yes/No | Reference: |
| * A summary proposal for the contractual OLA | Yes/No | Reference: |
| * The controls proposed to monitor the performance of DG TAXUD's contractors in the area of asset management, to ensure the integration of asset management activities and the accuracy of the resulting reports | Yes/No | Reference: |
| * The controls proposed to monitor the performance of DG TAXUD's **ITSM3 Operations** contractor in the area of portfolio management, to ensure the integration of portfolio management activities and the accuracy of the resulting reports | Yes/No | Reference: |
| * The controls proposed to monitor the performance of DG TAXUD's contractors in the area of programme management, to ensure the integration of programme management activities and the accuracy of the resulting reports | Yes/No | Reference: |
| * The controls proposed to monitor the performance of DG TAXUD's contractors in the area of project management, to ensure the integration of project management activities and the accuracy of the resulting reports | Yes/No | Reference: |
| * The controls proposed to ensure the security of DG TAXUD IT operations and the accuracy of the resulting reports | Yes/No | Reference: |

### Take-Over

Have you provided all the elements requested in the table below? Complete accordingly the “Yes/No” and reference boxes in regard to each requested entry.

|  |  |  |
| --- | --- | --- |
| The tenderer must provide: |  |  |
| * His understanding of the status of the services to be provided at Take-Over time, and of the risks associated to the Take-Over | Yes/No | Reference: |
| * The description of the critical success factors for a successful Take-Over along with the plan proposed to mitigate the risks | Yes/No | Reference: |
| * His commitment to ensure continuity of all services provided by the incumbent ITSM2 Lot 3 contractor as described in the Framework Quality Plan and annexed documents provided in the baseline - and to provide them – at the end of the Take-Over period – without interruption and with the same high level of quality as currently provided by the incumbent contractor | Yes/No | Reference: |
| * The Take-Over Plan in which all the ITSM2 Lot3 activities to be taken over are clearly allocated | Yes/No | Reference: |
| * The training plan to assure that all required staff will be available to attend training sessions during the Take-Over | Yes/No | Reference: |
| * The tenderer is requested to describe in its bid how he intends to ensure that the organisation shall be capable of absorbing and thoroughly following the in-flight projects while keeping full capacity to execute the Take-Over activities (training, shadowing, documentation, etc.). | Yes/No | Reference: |

### Hand-Over

Have you provided all the elements requested in the table below? Complete accordingly the “Yes/No” and reference boxes in regard to each requested entry.

|  |  |  |
| --- | --- | --- |
| The tenderer must provide: |  |  |
| * A description of the processes, organisation and tools he proposes in order to maintain a knowledge base and documentation all along the contract, which will facilitate the Hand-Over at the end of the contract. | Yes/No | Reference: |
| * A description of the processes, organisation and tools he intends to put into place for the Hand-Over of the systems and applications and his related documentation at the end of the contract. | Yes/No | Reference: |
| * The Hand-Over Plan in which all the **ITSM3 Integration** activities to be handed over are clearly allocated | Yes/No | Reference: |

## Fitness of the proposed organisation (20% weight for the technical evaluation)

Have you provided all the elements requested in the table below? Complete accordingly the “Yes/No” and reference boxes in regard to each requested entry.

| The tenderer must provide: |  |  |
| --- | --- | --- |
| * The organisational structure, supported by **a single structure chart**, that he intends to put into place to support the required services, including functions, roles, responsibilities and lines of reporting, location | Yes/No | Reference: |
| * The composition of the contractor's team allocated to the activity and that will remain allocated as of the signature of the first Specific Contract | Yes/No | Reference: |
| * A description of the relationships between the various functions of the tenderer | Yes/No | Reference |
| * A description of the lines of communication with DG TAXUD (interaction model, governance model) | Yes/No | Reference: |
| * A description of the relationships between the tenderer and external 3rd parties involved in the delivery of the requested services | Yes/No | Reference: |
| * A description of how the proposed organisation will support the service requirements as specified in the technical specifications | Yes/No | Reference: |
| * A profile for each role that he plans to use to provision the services. The profile must include the following information:   + A **Job Functions & Duties**: overall purpose, list of functions and duties, list of objectives;   + A **Job Requirement**: formal education, experience and seniority, training, knowledge, talent and skills.   The profile will be used by the awarded tenderer to select appropriate CVs for the job during the contract and by DG TAXUD to check that the CVs of the assigned staff are in line with the profile. No CVs or names should be provided in the proposal. | Yes/No | Reference: |
| * A description of the mechanism to guarantee the competence of the staff | Yes/No | Reference: |
| * A description of his approach to deliver the expected services according to the requested service level requirements. | Yes/No | Reference: |
| * A description of the training programme for the staff | Yes/No | Reference: |
| * A description of the office environment which will host his team, including security arrangement and collaboration platform | Yes/No | Reference: |
| * A description of the way security rights management will be handled so that only authorised users can access the secure zone hosting the above-mentioned team. | Yes/No | Reference: |
| * The commitment that he will allocate enough resources with the correct knowledge and required competences to perform all activities in full autonomy | Yes/No | Reference: |
| * The commitment that the proposed team will be dedicated (for a full 100%) to the activity or to be available up to the degree that was foreseen in the tender or to a subsequent agreed degree with DG TAXUD | Yes/No | Reference: |

## Fitness of the proposed methods, processes and services (20% weight for the technical evaluation)

The methods and processes must be described in the context specific to the required services of this call for tenders and not as a generic description of what could be a possible implementation. The tenderer must avoid inserting extracts of “context free” generic internal documentation.

Have you provided all the elements requested in the table below? Complete accordingly the “Yes/No” and reference boxes in regard to each requested entry.

| The tenderer must provide: |  |  |
| --- | --- | --- |
| * A description of the knowledge base, including the description of how it is fed and maintained up to date | Yes/No | Reference: |
| * A description of the infrastructure (tools & services) that he proposes to use for office automation, the overall administration and follow-up of the contract, including security arrangement | Yes/No | Reference: |
| * A detailed description of how he is going to proceed to deliver the expected services according to the requested service level requirements | Yes/No | Reference: |
| * An overview of the proposed process to keep an up-to-date view of the organisations involved in **ITSM3** delivery so that it is possible to identify at all times the right contact persons in the various organisation involved | Yes/No | Reference: |
| * A presentation of its own methodology to benchmarking and assessments | Yes/No | Reference: |
| * A description of how he is going to provide training/workshops, in English or French | Yes/No | Reference: |

## Structure, clarity and level of completeness of the proposal (10 % weight for the technical evaluation)

The overall presentation will be taken into account in evaluating the response to this criterion.

(No answer from the tenderer is to be provided for this section)

# FINANCIAL EVALUATION

**In case of a joint offer, this section has to be completed on behalf of the tendering group.**

## Have you filled in your price quotes in Annex 3 to the Tendering Specifications? (Please note that price quotes have to be all-inclusive, additional costs may not be charged.)

YES/NO (MANDATORY)

## Do you confirm that you agree not to charge additional costs to the Commission?

YES/NO (MANDATORY)

It is mandatory to fill in all columns and lines of the Excel sheet "a3\_price\_table.xlsx" provided as Annex 3 to the Tendering Specifications.

**Attachment 1**

**Project Reference Form**

The Project Reference Form must be used to give details about relevant projects that the tenderer wants to present as proof of experience.

The Project Reference Form consists of two pages:

* Front page;
* Description page.

Both pages must be used to form a complete Project Reference Form.

A new Project Reference Form must be completed for each project.

Contact persons may be contacted by the Commission in the context of this call for tenders.

Use of this form is mandatory – only projects submitted on this form will be considered.

The delivery has to be certified by the purchaser; or failing this, declared by the service provider to have been effected.

**Project Reference Form (page 1 of 2)**

**Project reference n° xx**

**Project reference front page**

|  |
| --- |
| **Project name:**  **Start date (mm/yy):** **Finish date (mm/yy):**  **Client name:** **Contact person:**  **Phone:** |
| **Project type** (development, maintenance, study, support, etc…):  **Principal contractor** for this project (If it is not the tenderer, explain the tenderer’s role) :  **Principal location** for this project:   Tenderer's premises   Client's premises   Other – Precise:  **Responsibility of the tenderer in the contractor organisation (prime, subcontractor, member of tendering group):**  **Number of tenderer's own technical staff involved in person-days, by profile:**  **Profile name**  person-days    Total |
| **Methodologies involved:**  **Technologies involved (hardware, software and tools) :** |

**Project Reference Form (page 2 of 2)**

**Project reference n° xx**

**Project reference description page**

|  |
| --- |
| **Area(s) covered by the project (for example Human Resources, Finance, Environment,…):** |
| **Project description:** |

**Declaration of conformity:**

**Attachment 2**

**Freelancers Table**

Note that a letter of intent must be provided for all freelancers.

This table has to be provided in a separate envelope in order to comply with the protection of personal data (section 6.3.4 of the Guidebook for tenderers).

|  |  |  |
| --- | --- | --- |
| Surname | First name | Name of the freelancer's company (if different from freelancer's surname) |
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1. To be filled in as many times as there are members [↑](#footnote-ref-2)
2. To be filled in as many times as there are subcontractors [↑](#footnote-ref-3)
3. If a sole tenderer or a tendering group intends also to rely on the economic and financial capacity of the subcontractor(s), the subcontractor(s) also have to fill in Section 3 (except bullet point 4). [↑](#footnote-ref-4)