



TENDER SPECIFICATIONS EU-OSHA/2018/OP/F/SE/0060

‘Provision of ICT and Web services’

Type of procedure: open procedure (with 4 lots)

Type of contract: framework contract

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Tender documents are available for download at:

<https://osha.europa.eu/en/about-eu-osha/procurement>

Contracting authority:

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1 Introduction

1.1 The European Agency for Safety and Health at Work

The European Agency for Safety and Health at Work (EU-OSHA) is an agency of the European Union (EU) and one of the decentralised Community bodies. Its central role is to contribute to the promotion of safer, healthier and more productive workplaces by developing, analysing and disseminating information on occupational safety and health (OSH). As a tripartite organisation, EU-OSHA works closely with governments and employers' and workers' representatives to share good practice and to reach workers and workplaces across Europe. EU-OSHA's main safety and health information network is made up of focal points in all EU Member States and candidate, potential candidate and European Free Trade Area countries (https://osha.europa.eu/en/about/organisation/focal_points). A country's focal point is normally the national OSH authority; the focal points represent EU-OSHA and support its activities, such as the Healthy Workplaces Campaign.

Located in Bilbao, Spain, EU-OSHA has a dedicated staff of safety and health specialists and a network of partners in all Member States and beyond. As well as running Europe-wide information campaigns, EU-OSHA also publishes scientific research in print and online media.

More information can be found at <https://osha.europa.eu/en>.

1.2 Background to this call for tender

Within the framework of its 2014-2020 strategy, EU-OSHA has engaged in the development of a number of websites and web applications and it will continue in the future within the new strategy.

Moreover, EU-OSHA will continue to update and improve its existing websites and web applications (See Annex XIX — List of EU-OSHA existing websites and applications).

The objective of this call for tender is to support EU-OSHA within this process by providing maintenance developments, hosting and usability services.

1.3 Time schedule for this tender

Task	Date	Comments
Launch date	Monday 25/06/2018	Contract notice sent to Official Journal
Deadline for request of clarifications from EU-OSHA ¹	Thursday 26/07/2018	https://osha.europa.eu/en/about-eu-osha/procurement
Deadline for submission of tenders	Friday 03/08/2018	See invitation to tender for details
Opening session (public)	Monday 03/09/2018 15:00	See contract notice for details
Date for evaluation of tenders	September 2018 October 2018	Estimated
Notification of award(s) to the selected tenderer(s)	October 2018	Estimated
Framework contract(s) signature	Monday 15/10/2018	Estimated

¹ 6 working days before deadline



1.4 Estimated volume

The maximum budget estimated for each lot is:

Lots	Yearly estimated amount	Duration	Total estimated amount
Lot 1: Maintenance Plone applications and OSHWiki	100,000 €	5 years	500,000 €
Lot 2: Development and maintenance of Microsoft applications	100,000 €	4 years	400,000 €
Lot 3: Hosting services	150,000 €	7 years	1,050,000 €
Lot 4: Usability services	80,000 €	4 years	320,000 €

2 Description of the requested tasks and services

2.1 Lot 1: Maintenance Plone applications and OSHWiki

2.1.1 Context

Scope

The contractor will provide maintenance services and technical support. As part of the maintenance needs, new small developments might be required to improve or create new features. EU-OSHA would also require its maintenance contractor to provide helpdesk support to the internal users of these tools:

- **OIRA:** The tools are available for use on <https://client.OiRAproject.eu/>, although they are added by external partners to the system on <https://admin.OiRAproject.eu/> (password required). The tools are added in just one language each, but currently we have tools in 16 different languages.
- **Extranet:** A Plone based repository of files arranged as directories and subdirectories structure, with customised access to individual users based on permissions at folder level. <https://extranet.osha.europa.eu/> (password required)
- **OSHWiki:** Based in Mediawiki software, it is a wiki with a multilingual repository of OSH terms, updated by a community of authors. <https://oshwiki.eu/>

More details can be found in [Annex XIX — List of EU-OSHA existing websites and applications.](#)

Technologies

The technologies used for this lot are:

- OIRA is built using the open source CMS Plone 5. The software is released in EU-OSHA's repository:
 - OSHA specific customizations : <https://github.com/EU-OSHA/osha.OiRA>
 - the main package : <https://github.com/EU-OSHA/Euphorie>
 - extra code for the statistics: pdf reports : <https://github.com/EU-OSHA/OiRA.reports>
 - supporting documentation: <https://github.com/EU-OSHA/OiRA.documentation>
- The Extranet is built using the open source CMS Plone 4.2.5.
- The OSHWiki is built using Mediawiki 1.26.2 with its visual editor for the articles (https://www.mediawiki.org/wiki/Help:VisualEditor/User_guide)

More details can be found in [Annex XIX — List of EU-OSHA existing websites and applications.](#)

Methodology

Currently, EU-OSHA uses a methodological framework aligned with PM² best practices (https://ec.europa.eu/isa2/solutions/open-pm2_en) to maintain a pragmatic and result-oriented approach for the global management of projects (project initiation request, business case, project charter, project plan, project status report...).

However, the management of the developments is based on agile and scrum methodologies.

Tools

The contractors are expected to use EU-OSHA's issue tracker. The tool is used for the management of maintenance and developments to:

- keep a record of all the tasks and issues performed and the continual communication between EU-OSHA and the contractor
- monitor budget expenditure
- plan tasks and projects
- plan releases and deployments



- monitor the implementation of the contracts by meeting the terms of the Service Level Agreement (see [Annex XIV — Draft SLA - Maintenance of Plone applications and OSHWiki \(Lot 1\)](#))

EU-OSHA has its own repositories for the management of the versioning of its websites and applications.

EU-OSHA has its own tool for the management of the statistics for its websites and applications.

More details could be found in [Annex XXI — List of EU-OSHA tools](#).

Languages

EU-OSHA policy is to offer the content of its public websites and web applications in **25 EU/EFTA languages**. However, the OiRA tools are entered by the OiRA partners in their own languages, the same as for the OSHWiki, where each author adds the content on his own. The extranet is in English only.

2.1.2 Services

The tasks for the following services should include:

- Kick-off meeting to clarify EU-OSHA requirements;
- Internal project management;
- In order to effectively cooperate regular meetings will be held with the other stakeholders;
- Preparation of the interim and final reports.

Maintenance

The work may include, but is not limited to, the following tasks:

- Analysis of systems requirements and provision of recommendations;
- Technical analysis to recommend the tools to be used;
- Design of the software;
- Development of the requirements;
- Components integration;
- Adaptation/integration of the online graphical design;
- Developments and adaptations derived from Search Engine Optimisation initiatives;
- Unit and integration tests in accordance with the guidelines provided by the contractor for project management support;
- Preparation of documents and manuals.

Support

The work may include, but is not limited to, the following tasks:

- Helpdesk support to internal and external stakeholders;
- Support (technical helpdesk to support EU-OSHA staff);
- Handover support.

Functional induction

The work may include, but is not limited to, the following tasks:

- Design and development of documentation and induction products;
- Delivery of online and/or face-to-face induction related to the improvements and new developments carried out by the selected contractor.



Online content publishing

OiRA tools are maintained by the OiRA Partners themselves, the OSHWiki is edited by a group of editors and EU-OSHA staff and the extranet is fed by stakeholders. However, the Agency might require further content maintenance works.

Those works include, but are not limited to:

- Support for multilingual and multimedia content editing, publishing and upload, including translated versions (html pages, files...). Translations are provided by EU-OSHA;
- Adaptation or development of existing webpages including editing or reorganising existing web features that go along with the content (e.g. moving or creating new portlets, boxes...);
- Testing and fixing of multilingual content, including fixing of broken links;
- Reducing the number of problematic links, as reported in Google's webmaster tools;
- Performing search engine optimisation (SEO) and search engine marketing (SEM) initiatives developed by the contractor for project management support in order to implement the SEO and SEM strategy.



2.2 Lot 2: Development and maintenance of Microsoft applications

2.2.1 Context

Scope

This lot is intended to cover the development, maintenance and induction of ICT applications using Microsoft technologies. The contractor for this lot will perform these tasks for any Microsoft-based ICT product needed by the Agency, with the exception of the future website (even if a Microsoft solution is chosen).

The contractor will provide maintenance of the following applications:

- EU-OSHA Intranet (Microsoft SharePoint);
- EU-OSHA Workspaces (Microsoft SharePoint);
- EU-OSHA Client Relationship Management (Microsoft CRM Dynamic).

Other applications using Microsoft technologies could be added to this list during the validity of the contract (we estimate that 1 new application could be added during the duration of the Framework Contract).

Technologies

The technologies used for this lot are:

- Microsoft CRM Dynamic 2013
- Microsoft SharePoint 2013
- Microsoft SQL 2012

If other applications are added, during the validity of the contract, **they could be developed using different Microsoft technologies** from those currently used by EU-OSHA.

Methodology

Currently, EU-OSHA uses a methodological framework aligned with PM² best practices (https://ec.europa.eu/isa2/solutions/open-pm2_en) to maintain a pragmatic and result-oriented approach for the global management of projects (project initiation request, business case, project charter, project plan, project status report...).

However, the management of the developments is based on agile and scrum methodologies.

Tools

The contractors are expected to use EU-OSHA's issue tracker. The tool is used for the management of maintenance and developments to:

- keep a record of all the tasks and issues performed and the continual communication between EU-OSHA and the contractor
- monitor budget expenditure
- plan tasks and projects
- plan releases and deployments
- monitor the implementation of the contracts by meeting the terms of the Service Level Agreement (see [Annex XV — Draft SLA - Maintenance of Microsoft applications \(Lot 2\)](#))

EU-OSHA has its own repositories for the management of the versioning of its websites and applications.

More details could be found in [Annex XXI — List of EU-OSHA tools](#).



Languages

EU-OSHA Microsoft applications are only developed in English.

2.2.2 Services

The tasks for the following services should include:

- Kick-off meeting to clarify EU-OSHA requirements;
- Internal project management;
- In order to effectively cooperate regular meetings will be held with the other stakeholders;
- Preparation of the interim and final reports.

Maintenance and developments

The work may include, but is not limited to, the following tasks:

- Analysis of systems requirements and provision of recommendations;
- Technical analysis to recommend the tools to be used;
- Design of the software;
- Development of the requirements;
- Components integration;
- Adaptation/integration of the online graphical design;
- Developments and adaptations derived from SEO initiatives;
- Unit and integration tests in accordance with the guidelines provided by the contractor for project management support;
- Preparation of documents and manuals.

Support

The work may include, but is not limited to, the following tasks:

- Helpdesk support to internal and external stakeholders;
- Support (technical helpdesk to support EU-OSHA staff);
- Handover support.

Functional induction

The work may include, but is not limited to, the following tasks:

- Design and development of documentation and induction products;
- Delivery of online and/or face-to-face induction related to the improvements and new developments carried out by the selected contractor.



2.3 Lot 3: Hosting services

2.3.1 Context

Scope

The selected contractor should provide **hosting services** (including both staging and production sites) for the Agency hosted websites and web applications: [Annex XIX — List of EU-OSHA existing websites and applications](#).

Websites and web applications could be added or removed to this list during the validity of the contract (we estimate that each year 1 new application could be added and 1 could be removed).

It is important to note that the tenderer must be established in the EU, as must all the servers that will host the Agency sites. The tenderer must fulfil the data protection regulations detailed in [3.2 - Data protection](#).

Agency hosted websites are grouped in various “Environments”. Each environment is composed by one or more servers aimed at hosting one or more websites. Each environment could have one or more instances of the CMS and/or tool used on it.

Technologies

The technologies used for this lot are:

- The majority of the websites are built using Drupal 7.59;
- OiRA is built using the open source CMS Plone 5;
- Extranet is built using the open source CMS Plone 4;
- The OSHWiki is built using Mediawiki 1.26.2;
- The data-visualisation tools (DVT) are built using Pentaho 6.0.1.0-386 (with the exception of ESENER built using R 3.1.3);
- Matomo (former Piwik) 3.5.0;
- LDAP.

More details can be found in [Annex XIX — List of EU-OSHA existing websites and applications](#). Only the one with the “External Hosting” value are included in this Lot.

If other websites and web applications are added, during the validity of the contract, **they could be developed using different software** from that currently used by EU-OSHA.

Methodology

Currently, EU-OSHA uses a methodological framework aligned with PM² best practices (https://ec.europa.eu/isa2/solutions/open-pm2_en) to maintain a pragmatic and result-oriented approach for the global management of projects (project initiation request, business case, project charter, project plan, project status report...).

However, the management of the developments is based on agile and scrum methodologies.

Tools

The contractors are expected to use EU-OSHA's issue tracker. The tool is used for the management of maintenance and developments to:

- keep a record of all the tasks and issues performed and the continual communication between EU-OSHA and the contractor
- plan releases and deployments

EU-OSHA makes use of some tools for the overall management and monitoring of the websites.



- EU-OSHA has its own repositories for the management of the versioning of its websites and applications.
- EU-OSHA has its own monitoring tool used to monitor the implementation of the contracts by meeting the terms of the Service Level Agreement (See [Annex XVI — Draft SLA - Hosting services \(Lot 3\)](#)).
- EU-OSHA has its own web statistics tools to follow up the visits, downloads... from all websites.
- EU-OSHA has its own LDAP user repository used across all websites for a centralized user management.

More details could be found in [Annex XXI — List of EU-OSHA tools](#).

2.3.2 Services

The tasks for the following services should include:

- Kick-off meeting to clarify EU-OSHA requirements;
- Internal project management;
- In order to effectively cooperate regular meetings will be held with the other stakeholders;
- Preparation of the interim and final reports.

Hosting and Maintenance

The different services that will need to be provided as part of the “Hosting and Maintenance” will be:

- **Hosting (Staging and Production)**

For each one of the EU-OSHA hosted websites there will be one production and one staging hosting environment, that should be aligned in terms of OS and software versions used on them, but not in terms of resources.

The contractor will be responsible for the on-going fine-tuning of the resources and the bandwidth required by each environment in order to ensure the fulfilment of the hosting metrics established in the SLA for all EU-OSHA hosted websites.

- **Environment and instance maintenance**

The service will consist of the proactive/reactive identification and timely resolutions of possible incidence that could affect the integrity of each and every environment and instance used for hosting the EU-OSHA websites and applications.

The contractor will be responsible for providing interventions needed to assure the security, availability and continuity of services. Except the critical ones, interventions will be in general executed outside EU-OSHA working hours. Three levels of intervention are expected:

- **Automated intervention:** This level of service includes actions such as replacing storage resources or inconsistent elements. These tasks are the responsibility of the contractor without the participation of the Agency. The Agency should be informed before the intervention and the Agency can request that the intervention be postponed or cancelled.
- **Standard intervention:** This level of service will apply to intervention that neither the Agency nor the selected contractor considers time-critical. The Agency will decide with the contractor’s input about the timeframe for each intervention.
- **Critical intervention:** This level of service will apply to the request for expert assistance that is deemed time-critical. It refers mainly to emergencies, such as unexpected deterioration of performance, requiring prompt identification and rectification of the problem. A critical intervention will be carried out by the contractor in collaboration with the Agency personnel as well as with the application developer and hosting provider as



required. The Agency should be informed of the intervention but the contractor could act without Agency's approval in order to solve the problem as fast as possible.

- **Software maintenance**

The service will consist of the proactive identification and timely installation of known updates or fixes to the **software versions used on the Agency's sites** (Drupal, Plone, Semantic Mediawiki, MySQL, Zope... see [2.3.1 Context](#) for the details) as well as the maintenance of the operating systems.

This will be done in close collaboration with both EU-OSHA and the developers of the websites in order to ensure that the compatibility of such updates and fixes is checked before their installation.

- **Existing Instance deployment (Release management)**

The service will consist on the deployment of new releases following a regular weekly planning of release deployment (both for staging and productions sites). Additionally some special out-of-planning release deployments could be required.

- **Helpdesk and support**

This service will be provided to Agency ICT staff by email/phone/Issue tracker, during and outside the Agency's working days (see [Annex XVIII — EU-OSHA 2018 Calendar](#)) and working hours (09:00 – 17:00).

It will be required to offer technical advice and expert intervention on demand to the personnel of the ICT staff of the Agency. The service should be able to deal not only with incidents reported but also with 'How-to' questions, for example about the web service technical environment, installed software/products, or end-user features or other more technical questions.

- **Monitoring**

The **contractor will have to provide a set of tools** (web-based tools) which allows the Agency to monitor the service:

- **Infrastructure checks:** Every machine and every automatically managed component comes with a set of standardised checks. The checks cover hardware and software aspects such as CPU load, memory usage, disk usage, network availability, running processes...
- **Application checks:** Currently application-specific checks are implemented when deploying a service on top of the platform. They follow some recurring patterns (such as port availability, protocol-level, processes and log checks) adjusted for each service (e.g. Zope, ZEO, Deliverance, Supervisor). They also look deeper into the application by checking if an expected content exists on a specific page.
- **Remote checks:** The Agency uses additional checks that are run outside the data centre, i.e. satellite checks. Satellite checks are used to measure the performance of the site in various parts of the world (e.g. Latvia, Greece, Norway...). This is compared with performance data gathered for other sites such as gmx.de, elpais.es, yahoo.com, google.com.

- **Reporting**

The contractor will be responsible for preparing the "Monthly Hosting Service Report", which will at least include:

- Summary of main tasks conducted during the reported period
- SLA Metrics
- Monitoring of running contracts consumption



- Detail of active environments and servers
- Data on the average resource usage during the reported period

- **Stress Test**

The contractor will have to perform some stress tests in order to check the responsiveness of a specific website or web application. These stress tests should be either anonymous or with an authenticated user. Moreover it should simulate a scenario that will be defined by EU-OSHA.

- **Complementary DNS**

The contractor will provide tertiary and quaternary DNS servers for all EU-OSHA domains.

Deployment of a new instance

Whenever a new sites is to be created, EU-OSHA will require a first release deployment service.

In such cases, the tenderer will deploy the new site according to the Deployment Guide provided by the website developer. This new deployment could be requested to be done either in an already existing environment or in a new one.

As a result of the new instance deployment, new Staging and Production websites will be operational for the new instance.

2.3.3 Hosting and Maintenance Units

Definition

“Hosting and Maintenance Units” is calculated with the total sum of resources used by all the environments. The formula used for this calculation is:

$$\text{Hosting and Maintenance Unit} = ((40 * \text{CPU}) + (20 * \text{Memory GB}) + \text{GB Disk}) / 1000$$

The result of the formula will be rounded up. As an example, if the sum of all “Hosting and Maintenance Unit” for all environments makes a total value of 10,66, 11 “Hosting and Maintenance Units” will be contracted. A detailed reference of the current situation can be found in [Annex XX — List of EU-OSHA Hosting Environments](#).

For the financial offer we will use the monthly cost of a Hosting and Maintenance Unit as a reference.

Monitoring

For any given environment, the contractor will need to provide EU-OSHA with a justification of the resources assigned to it. This justification should include any information the contractor will consider pertinent as proof of such resource assignment.

As part of the Monthly Review Meeting, the resource assignment will be reviewed. If needed, decision will be taken regarding the resource reassignment/increase within the available resource pool provided by the contracted “Hosting and Maintenance Units”.

Hosting size flexibility

The sites are the main tools supporting workplace health and safety initiatives, and awareness campaigns. Owing to the periodical nature of such events, the sites may be subject to increased demand coinciding with the events.

Since periods of increased demand can be predicted, the service should be able (flexible enough) to increase its capacity for a defined period upon advice from the Agency. The service must provide the possibility of on-going fine-tuning of both the resources and the bandwidth required for hosting the website.



2.4 Lot 4: Usability services

2.4.1 Context

Scope

The aim of this lot is to ensure that all online and ICT products and services developed or adapted by or for EU-OSHA **are designed and developed considering users' needs and according to the highest market usability standards.**

EU-OSHA's online strategy was developed for the timeframe 2014-2020 (See [Annex XXII — EU-OSHA online strategy](#)). In this context, there is a continuous development of new websites and web applications. However, existing websites and web applications will be subject to new and incremental developments, maintenance and user induction.

Methodology

Currently, EU-OSHA uses a methodological framework aligned with PM² best practices (https://ec.europa.eu/isa2/solutions/open-pm2_en) to maintain a pragmatic and result-oriented approach for the global management of projects (project initiation request, business case, project charter, project plan, project status report...).

Languages

EU-OSHA policy is to offer the content of its websites and web applications in **25 EU/EFTA languages**. Most of the content is translated by the Translation Centre for the Bodies of the European Union; some content is automatically translated; some content is not currently translated but could be in the future. **Multilingual coverage** is and will remain a key priority for the Agency.

2.4.2 Services

The services described in this section comprise the conduct of usability studies and the provision of recommendations to improve functionality and navigation within all current and future EU-OSHA websites and applications.

The tenderer must ensure that tests of the usability of EU-OSHA products and services measure all three main dimensions of usability:

- Effectiveness: users should be able to complete key tasks with few errors or problems.
- Efficiency: tasks should be completed quickly and easily.
- User satisfaction: users should value the websites and applications they use for completing the tasks.

At the same time, the selected contractor shall define metrics of success for usability improvements such as:

- An increase in the percentage of users visiting more than one page.
- A reduction in the percentage of users dropping out of the registration process.

This metrics will be provided to the contractor for project management support so that they can be included in the dashboard for achieving the expected improvements.

The tasks for the 6 services should include:

- Kick-off meeting to clarify EU-OSHA requirements;
- Internal project management;
- In order to effectively cooperate regular meetings will be held with the other stakeholders;
- Preparation of the interim and final reports.



User flows definition

The contractor should test if the way the users interact in the website is the best possible and propose improvements to be agreed by EU-OSHA.

Information architecture analysis

To validate whether the users are able to find the main features of the website within an acceptable time, and to validate if the naming of sections is meaningful enough for the users.

Usability expert review

Usability experts should evaluate the overall usability of an existing page or its graphical design, identifying problematic areas and looking for improvements to the overall usability of the website. The services covered in this section include, but are not limited to, the following:

- Analysis and provision of advice on the design and usability of all websites and applications throughout the whole software development life cycle (SDLC);
- Definition of usability testing in agreement with EU-OSHA and in collaboration with other relevant contractors (e.g. developers);
- Collection and analysis of users' feedback about design and usability;
- Definition of all tasks to be developed during the tests so that users are motivated to perform them;
- Organisation of the results of usability testing following each of the three dimensions mentioned in the previous section.

A document reporting the overall usability score of the webpage should be produced. This document will contain the issues found and will prioritize them according to their importance. Proposals for detected issues will be provided in written in this document.

Wireframe

A set of 3 wireframes (a black and white sketch of an interface component delivered as image) with different solutions to solve issues found during the usability expert review.

User testing

In order to evaluate the usability of a website or prototype, a test made by real users will be carried out. This task includes: selection of the respondents; preparation of the testing scenarios; the testing itself; evaluation of the tests and drafting the final report. User testing is based on the following methods:

- In-lab or on-site user interactions with the websites and applications while performing real tasks;
- Evaluation of time or actions (such as mouse clicks) needed to accomplish a task;
- Recording of user paths and mouse paths;
- Eye tracking tests (when relevant);
- Face-to-face and/or telephone interviews to elicit users' views and satisfaction;
- Online website user surveys.

By default there will be 8 users: 4 provided by EU-OSHA and 4 by the contractor.

Face-to-face and online workshops

Throughout the execution of the projects, it may be necessary to organise and carry out usability workshops for Agency staff and/or stakeholders (with a maximum of 20 participants).

This service must include, but is not limited to:



- Design and moderation of each workshop considering type of project, goals, type and number of participants, documentation materials and the evaluation method;
- Online platform offer in order to deliver online workshops;
- Evaluation of the workshop.

2.4.3 Categories

These services will be performed on different categories of websites and web applications.

Simple

Static pages. Pages with few elements.

Examples:

- <https://www.napofilm.net/en/about-napo/the-napo-story>
- <https://healthy-workplaces.eu/en/priority-area/facts-and-figures>
- <https://healthy-workplaces.eu/en/good-practice-awards>

Medium

Pages that might include many elements, carousels, newsletters...

Examples:

- <https://osha.europa.eu/en/themes/osh-management-context-ageing-workforce>
- <http://toolkit.osha.europa.eu/tools/media-communication-tools/press-kit>
- https://healthy-workplaces.eu/en/entity-collection/hwc_2018_19_newsletter_1

Complex

Home pages, forms, Search interfaces, interactive

Examples:

- <https://healthy-workplaces.eu/en>
- <https://osha.europa.eu/en/tools-and-publications/publications>
- <https://eguides.osha.europa.eu/dangerous-substances/my-chemical-guide-long-questionnaire>



3 General requirements of the framework contract

For its organisation and functioning, EU-OSHA is in constant need of goods and services. Tendering is the structured way to consult the market for the purchase of these goods and services.

The purpose of competitive tendering for awarding contracts is twofold:

- to ensure the transparency of operations;
- to obtain the desired quality of services, supplies and works at the best possible price.

The applicable regulations, namely Directive 2014/24/EU and Regulations No 966/2012 (European Parliament and Council) and No 1268/2012 (European Commission), as amended, oblige EU-OSHA to guarantee the widest possible participation, on equal terms, in tender procedures and contracts.

3.1 Social, labour and human aspects

Tenderers should fulfil and be able to document/report on all obligations derived from the OSH Framework Directive (Council Directive 89/391/EEC) on the introduction of measures to encourage improvements in the safety and health at work, and the corresponding transposition into their country's national law.

EU-OSHA, as a European public institution, pays special attention to the protection of social, labour and human rights.

In line with this, the tenderer shall comply with the European and/or national law in force applicable in these fields covering, among other issues, equal employment opportunities, labour market integration of persons with disabilities, the prohibition of child labour and the protection of young people's employment.

Please also refer to Article II.4.1.2 of the Model of Framework Contract.

3.2 Data protection

Tenderers should fulfil and be able to document/report on all obligations derived from the Regulation (EC) No 45/2001 (and its future revisions²) on the protection of individuals with regard to the processing of personal data, which means in particular "any operation or set of operations which is performed upon personal data, whether or not by automatic means, such as collection, recording, organisation, storage, adaptation or alteration, retrieval, consultation, use, disclosure by transmission, dissemination or otherwise making available, alignment or combination, blocking, erasure or destruction".

3.3 Environmental aspects

EU-OSHA, as per its commitment to ensuring health and safety in general and at work in particular, pays special attention to the protection of the environment and of people.

To this end, EU-OSHA's objective is the purchase of goods, services and works that have a reduced impact on the environment throughout their life cycle in comparison with other goods, services and works with identical primary functions.

In this context and within the framework of this call for tender, the tenderer shall comply with the European and/or national law in force in these fields.

² A proposal for repealing and replacing existing Regulation (EC) 45/2001 on the protection of personal data by EU institutions and bodies is currently going through the legislative process. The specific data protection clauses contained in the framework contract may need to be amended in order to ensure compliance with this new Regulation



Please also refer to Article II.4.1.2 of the Model of Framework Contract.

The products, equipment and supplies that the Contractor shall allocate to the provision of the services requested shall be, wherever possible, green/biodegradable/recycled, with the least possible impact on the environment and human health in accordance with the European and/or national law in force, and shall contribute to a high standard quality achievement in the provision of these services.

In addition, the Contractor shall train the staff assigned to the provision of the services requested on how to carry out their tasks in a responsible and efficient way for human health and environment.

3.4 Participation in this tender

Participation in procurement procedures shall be open on equal terms to all natural and legal persons within the scope of the Treaties and to all natural and legal persons established in a third country that has a special agreement with the EU in the field of public procurement under the conditions laid down in that agreement. It shall also be open to international organisations.

EU-OSHA's Financial Regulation³ guarantees participation for all tenderers on equal terms.

Tenderers may submit a tender for one or more lots but the tender(s) should indicate clearly to which lot(s) it refers. In the case of bidding for several lots, technical and financial tenders for each lot must be provided in separate envelopes.

However, tenderers who wish to submit a tender for Lot 4 will not be able to submit a tender for Lot 1 and Lot 2., indeed Lot 4 contractors should work on usability with impartial point of view and therefore should be independent from contractors covering other lots.

In addition tenderers for Lots 1, 2 and 4 will have to demonstrate their independence with the current EU-OSHA contractors in charge of the Project Management Support by signing the Annex VIII — Declaration of confidentiality and conflict of interest.

In order to ensure consistency with all EU-OSHA communication activities, the successful tenderer(s) will be requested — whenever necessary — to work together effectively with the current and new contractors involved in the development of EU-OSHA web and ICT products.

Finally, tenderers will be requested to inform EU-OSHA about a possible conflict of interest or a professional conflicting interest in the tendering procedure (see Annex VIII — Declaration of confidentiality and conflict of interest).

3.5 Contractual approach of this tender

Through this call for tender EU-OSHA intends to establish framework contracts with specialised external contractors with the following type of contract:

- **Lot 1: single framework (5 years)**

The framework contract will be concluded between EU-OSHA and the successful tenderer for an initial period of 1 year from the date it is signed by EU-OSHA. Unless one of the parties receives *formal notification* to the contrary at least 3 months before the end of the ongoing duration, the contract may be extended automatically for four successive periods of 1 year, on the understanding that thereafter no further automatic extension will be possible.

- **Lot 2: framework contract in cascade with a maximum of 3 contractors (4 years)**

³ Available at <https://osha.europa.eu/en/about-eu-osha/what-we-do/how-we-work/finance>



The framework contract will be concluded between EU-OSHA and the successful tenderer(s) for an initial period of 1 year from the date it is signed by EU-OSHA. Unless one of the parties receives *formal notification* to the contrary at least 3 months before the end of the ongoing duration, the contract may be extended automatically for three successive periods of 1 year, on the understanding that thereafter no further automatic extension will be possible.

- **Lot 3: single framework (7 years)**

The framework contract will be concluded between EU-OSHA and the successful tenderer for an initial period of 2 years from the date it is signed by EU-OSHA. Unless one of the parties receives *formal notification* to the contrary at least 6 months before the end of the ongoing duration, the contract may be extended automatically for five successive periods of 1 year, on the understanding that thereafter no further automatic extension will be possible.

- **Lot 4: single framework (4 years)**

The framework contract will be concluded between EU-OSHA and the successful tenderer for an initial period of 1 year from the date it is signed by EU-OSHA. Unless one of the parties receives *formal notification* to the contrary at least 3 months before the end of the ongoing duration, the contract may be extended automatically for three successive periods of 1 year, on the understanding that thereafter no further automatic extension will be possible.

The submission of a tender implies acceptance of the terms and conditions specified in the draft framework contract, including the 'General terms and conditions applicable to contracts', and all provisions laid down in these specifications, annexes and, where applicable, additional documents.

A framework contract places reciprocal obligations on both parties with regard to those elements, which are unalterably and unequivocally established when the contract is concluded, such as price (including revision rules), subject, basic performance conditions and duration, administrative and technical provisions, applicable during its validity period.

The framework contract will include the tasks and services described in these tender specifications. The bid will form an integral part of the contract, as will these specifications.

Any results or rights thereto, including copyright and other intellectual or industrial property rights, obtained in the performance of the framework contract shall be owned solely by EU-OSHA, as appropriate, which may use, publish or assign them as it sees fit, without geographical or other limitation, except where rights exist prior to the contract being entered into.

The contractor must ensure that all the services provided are delivered free of rights including copyright and other intellectual or industrial property rights (see Model of Framework Contract).

For the entire duration of the framework contract, the contractor(s) must provide sufficient resources to guarantee the stability of the service offered and the quality of the supplies necessary for the proper performance of the specific agreements.

The framework contract imposes no obligation on EU-OSHA to call on the services of the contractor. Only the implementation of the framework contract through specific contracts/order forms is binding on EU-OSHA.

The contractor has an obligation to respond to each request made by the contracting authority (see article I.4.3 of the model of framework contract).

3.6 Implementation of the framework contract

The contractor shall appoint an account manager, who will be the contact for all matters linked to the framework contract. The account manager shall guarantee efficient and on-demand responses to EU-OSHA's communications, requests for quotations, contacts, meetings and other administrative requests.



The account manager will have knowledge in the field of work of the framework contract and will be the single contact point for interaction with EU-OSHA. The account manager will follow up, discuss the works and gather additional details related to the services to be delivered and materials to be developed. The account manager could also be the project or service manager.

As the precise quantities and times for deliveries or performance cannot be determined in advance, tasks are to be carried out on the basis of specific contracts/order forms drawn up by EU-OSHA after consultation with the contractor and consistent with the financial offer. Owing to the complexity of the services covered by this tender, a request for services will be followed by an exchange of correspondence between EU-OSHA and the contractor, to define the concrete tasks, precise timescales and budget implications of the request. Within the limits of terms laid down in the framework contract, EU-OSHA will issue the specific contract/order form.

For single Framework contract, a specific contract/order form being sent by EU-OSHA to the contractor, EU-OSHA should receive it back, duly signed and dated. The period allowed for the execution of the task shall start to run from the date on which the last party signs the specific contract/order form.

For Framework contract in cascade, in addition to the above paragraph, if:

- the contractor does not accept the order
- the contractor fails to observe the deadline
- the offer does not meet EU-OSHA expectations or needs
- the contractor is in a situation of conflicting interests that may negatively affect the performance of the specific contract/order form (see Article II.7),

the contracting authority may place the order with the next contractor on the cascade.

In accordance with Article II.14 of the model of framework contract, an audit of the contractor's compliance with their contractual obligations may be carried out by EU-OSHA at the end of the framework contract.

A model of a specific contract/order form can be found as an annex to the model of framework contract.

A kick-off meeting to agree all contractual matters will be organised between the contractor and EU-OSHA after signature of the framework contract(s) at EU-OSHA's offices in Bilbao, Spain. During this meeting, EU-OSHA will provide a 1-day kick-off meeting for the key staff identified. All these persons must be the same as those proposed in the tender and all expenses will be borne by the tenderer (including travel and accommodation costs, daily allowances and staff fees).

For other meetings, the conditions of payment will apply according to Article 1.5 of the Framework Contract, based on on-site fees. All other expenses will be borne by the tenderer (including travel and accommodation costs).

The contractor will not be able to replace the staff described in the tender without explicit authorisation from EU-OSHA. EU-OSHA may reject any CV considered inadequate.

EU-OSHA staff will not assume organisational or managerial functions over the employees of the contractor's company. The latter should receive supervision, orders and instructions solely from their contractor company.

The provision of all the resources needed for the performance of the contracted work, is the responsibility of the contractor. It is the contractor's responsibility to manage its work and organise its resources with the required professionalism aimed at delivering the outcomes in time and with the due quality.

In case of a judgement or ruling for incurring in illegal transfer of workers, the contractor will assume the judicial, legal and financial consequences, without prejudice to the application of penalties and



compensations upon the specifications against the contractor for breach of its contractual obligations and of its internal responsibilities that could have disregarded.

These penalties are independent to the contractor's obligation to compensate the Agency for the damages that it could have caused to the Agency or to third parties, including minimum wage payments, social security contributions or cost layoffs that the Agency was due to make if it is condemned for illegal transfer of workers.

3.7 Terms of payment

With respect to the specific contracts/order forms signed under the framework contract, payments will be made against acceptance by EU-OSHA of agreed deliverables and provision of the necessary supporting documentation and reports as indicated in the model of framework contract in Article I.6.

3.8 Communication between EU-OSHA and the tenderer

Any contact between the contracting department and the tenderer during the procedure is forbidden, save in exceptional circumstances and under the conditions described in the invitation to tender (section 8).

3.9 Submission of a tender by a consortium of companies

Joint tenders from consortia of providers are permitted. A joint tender is a situation where a tender is submitted by a group of economic operators (natural or legal persons). Joint tenders may include subcontractors in addition to the members of the group.

In case of joint tenders, all members of the group assume joint and several liability towards EU-OSHA for the performance of the contract as a whole, i.e. both financial and operational liability. Nevertheless, tenderers must designate one of the economic operators as single point of contact (the leader) for administrative and financial aspects as well as operational management of the contract.

A consortium can be a permanent legally established grouping or a grouping which has been constituted for this tender procedure.

Tenders from consortia of firms or groups of providers, contractors or suppliers must specify the role, the qualifications and experience of each member of the group.

Each member of the consortium must be eligible in accordance with the conditions presented in section 5.2.7 - Selection criteria (each lot) and provide the required evidence of performing the contract and complete the form in Annex VI — Consortium form.

Tenders must include the means of control provided by the incorporation law of the constituent legal entities. If the consortium is not already legally established, in the event of a joint tender being awarded the contract, EU-OSHA may require the tenderers to give a formal status to the proposed association before the contract is signed.

3.10 Subcontracting

Subcontracting is permitted subject to approval by EU-OSHA, but the contractor will retain full liability towards EU-OSHA for performance of the contract as a whole. EU-OSHA may give approval either by accepting the tenderer's offer or by prior written approval, if proposed by the tenderer after the signing of the contract.

The tenderer must indicate clearly which parts of the work will be subcontracted. The total value of the subcontracted part of the services cannot represent the total value of the contract. All subcontractors, expected to carry out 10% of the work or more, must satisfy all criteria applicable to the award of the contract.



If the identity of the intended subcontractor(s) is already known at the time of submitting the tender, all subcontractors, covering 10% of the work or more must provide the required evidence (see section [5.2.7 - Selection criteria \(each lot\)](#)) and complete [Annex VII — Subcontracting form](#).

If the identity of the contractor is not known at the time of submitting the tender, the tenderer who is awarded the contract must seek EU-OSHA's prior written authorisation before entering into a subcontract. Where no subcontractor is given, the work will be assumed to be carried out directly by the tenderer.

3.11 Confidentiality and public access to documents

All documents submitted by the tenderer become the property of EU-OSHA and are deemed confidential.

In the general implementation of its activities and for the processing of tendering procedures in particular, EU-OSHA observes EU regulations as described in the invitation to tender (sections 13 and 14).

Regarding public access to documents, EU-OSHA applies EU Council regulation No 1049/2001 of 30 May 2001.

3.12 Price

Prices must be quoted in euros, and this applies also to tenderers from countries that are not part of the Eurozone, using the conversion rates published in the C series of the Official Journal of the European Communities on the day when the invitation to tender was issued (see http://ec.europa.eu/budget/contracts_grants/info_contracts/infoeuro/index_fr.cfm)

For tenderers in such countries, the price quoted may not be revised in line with exchange-rate movements and the tenderer accepts the risks or benefits of any fluctuations.

Prices should be quoted free of all duties, taxes and other charges (i.e. also free of value-added tax (VAT)), as EU-OSHA is exempt from such charges in the EU under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Communities of 8 April 1965 (OJ L 152, 13 July 1967).

For those countries in which national legislation provides an exemption by means of a reimbursement, the amount of VAT must be shown separately. In the event of any doubt about the applicable VAT system, it is the tenderer's responsibility to contact the relevant national authorities to clarify the way in which the European Community is exempt from VAT.

EU-OSHA will not reimburse expenses incurred in preparing and submitting tenders. EU-OSHA will not reimburse expenses incurred in attending opening sessions.

3.13 Additional important information

The tenderer shall be bound by the submitted tender for a period of 6 months following the closing date for submission. The successful tenderer must maintain this tender for a further 90 days from the date of notification of the award.

Completing the adjudication or the procedure of the call for tenders in no way imposes on EU-OSHA an obligation to award the contract. EU-OSHA shall not be liable for any compensation with respect to tenderers whose tenders have not been accepted, nor shall EU-OSHA be liable when deciding not to award the contract. This decision must be substantiated and the tenderers notified.

EU-OSHA's contractual obligation commences only upon signature of the contract with the successful tenderer. In case of doubt over interpretation of tender documents, the original English language version prevails.



4 Content and presentation of the tender

Tenderers are expected to examine carefully and respect all instructions and standard formats contained in these tender specifications. The tender must be presented with continuous page numbering on part B, so that it constitutes a coherent whole. As tenders will be judged on the content of their written tenders, these must clearly demonstrate that the tenderer is capable of carrying out the work.

Tenders must be submitted in one of the official languages of the EU. In order to ease and speed up the tender evaluation, English is the preferred language for submission.

The tender should be perfectly legible in order to rule out any ambiguity and be signed by the legal representative of the tenderer (in parts A where requested on the forms; in part B on a cover letter; in part C where requested on the form).

All tenders must consist of the following parts:

- Part A1: Administrative part and supporting documentation partly common to all lots;
- Part A2: Supporting documentation to selection criteria by lot;
- Part B: Technical offer for each lot;
- Part C: Financial offer for each lot.

4.1 Part A — administrative part and supporting documentation

The supporting documentation is an important part of the tender.

4.1.1 Common to all lots

The administrative part must contain all the information and documents required by the contracting authority for the evaluation of tenders and, in particular, the following documents:

- Checklist A1 ([Annex IA — Checklist \(common to all lots\)](#));
- Legal Entity Form including all documents required by this form ([Annex III — Legal entity form](#));
- Financial Identification Form including all documents required by this form ([Annex IV — Financial identification form](#));
- Tenderer's administrative information ([Annex V — Administrative form](#)).

When tenderers are presenting offers for several lots, these documents are needed only once (Annexes I.A and II to V).

4.1.2 By lots

- Checklist A2 ([Annex IB — Checklist \(for each lot\)](#));
- Declaration of honour for exclusion and selection criteria ([Annex II — Declaration of honour](#));
- Supporting documents for the selection criteria (all documentation requested in sections [5.2.7 - Selection criteria \(each lot\)](#)):
 - Statement of turnover and overall turnover
 - Financial statements
 - Declaration of a financial entity
 - Concise company profile
 - Description of the structure
 - List of main services
 - Mapping of PARFs and PARFs
 - Mapping of CVs and CVs
 - Concise presentation of premises and equipment when applicable
- If applicable, the Consortium form ([Annex VI — Consortium form](#));
- If applicable, the Subcontracting form ([Annex VII — Subcontracting form](#)).



4.2 Part B — technical offer (by lot)

This section is of great importance in the assessment of the tenders, the award of the contract and the future execution of any resulting contracts. The technical offer must meet all the specifications set out in the award criteria. Tenders must be specific and realistic while remaining clear and concise, in terms of both content and presentation.

The technical offer must be presented in a paper version and in an electronic version (USB memory stick or equivalent).

The technical offer will be assessed against the criteria set out in sections [5.2 - Evaluation of the tenders](#).

4.2.1 Quality of service, project management and quality assurance

Tenderers must provide a detailed and factual document of a maximum 5,000 words and 12 pages, presenting the tenderer's approach to **quality of service, project management** and **quality assurance** with regard to the scope of this call for tender. (Only the most restrictive of the limits will be considered and, therefore, text beyond the specified length will not be taken into consideration. Tenderers are requested to provide the information covering all the aspects included in the call for tender but avoiding documents including additional elements. Clarity and concision will be highly appreciated.)

The document shall cover the following:

- a description of the **approach for delivering the services** described in this call for tender;
- a description of the **project management approach**;
- a description of the **team organisation and the continuity of service**;
- a description of the **quality assurance and control procedure**;
- a description of the **transition phases** when starting and ending the contract in case of a change of contractor;
- a description of the **continuous improvement plans**;
- a description of the **data protection approach**.

In addition, for Lot 1 & 2, the tenderer should cover the following aspects:

- a description of how the tenderer will guarantee its **technical expertise** in the technologies used by EU-OSHA;
- a description of the tenderer's **development process** including continuous integration;
- a description of the **methodology used for estimating the cost** of a fixed-price request.

In addition, for Lot 3, the tenderer should cover the following aspects:

- a description of how the **tenderer's infrastructure** could support EU-OSHA environments;
- a description of the **Disaster Recovery Process**;
- a description of the **hotline and the monitoring process**;
- a description of its **green hosting** solutions.

In addition, for Lot 4, the tenderer should cover the following aspects:

- a description of the expert selection;
- a description of the tool used.



4.2.2 Service Level Agreement (SLA)

A Service Level Agreement will be signed with the contractor in order to ensure particular aspects of the service (quality, availability, responsibilities...).

Service Level Agreements are described in the following annexes:

- [Annex XIV — Draft SLA - Maintenance of Plone applications and OSHWiki \(Lot 1\)](#)
- [Annex XV — Draft SLA - Maintenance of Microsoft applications \(Lot 2\)](#)
- [Annex XVI — Draft SLA - Hosting services \(Lot 3\)](#)
- [Annex XVII — Draft SLA - Usability services \(Lot 4\)](#)

These draft SLA are the minimum requirements to be applied, but improvement could be proposed and other suitable elements could be added to this list. As new needs could arise during the duration of the contract, the SLA could be slightly modified, but any proposed changes will be agreed by both parties beforehand.

The SLA will be based on EU-OSHA working days (see [Annex XVIII — EU-OSHA 2018 Calendar](#)) and working hours (09:00 – 17:00).

Tenderers must provide a detailed and factual document of a maximum of 2,000 words and 4 pages, presenting the tenderer's approach to the management of the SLA. (Only the most restrictive of the limits will be considered and, therefore, text beyond the specified length will not be taken into consideration. Tenderers are requested to provide the information covering all the aspects included in the call for tender but avoiding documents including additional elements. Clarity and concision will be highly appreciated.)

The document shall cover the following:

- a description of the services to be provided, the work to be carried out and the methodology used to meet the terms of the SLA;
- a proposition of improvements (for EU-OSHA) that could be made in the draft SLA:
 - Improvement of the existing elements;
 - additional elements that could be added.

4.2.3 Scenarios

Tenderers for each lot must present their technical approach by means of scenarios development. The goal of each scenario is not to give a detailed description of the solution but to outline the approach that the tenderer would follow in order to solve the presented problem and related cases. The approaches will be assessed against the criteria mentioned in section [5.2 - Evaluation of the tenders](#). No award criteria and sub-criteria other than those mentioned in that section will be used to evaluate the technical offer.

The scenarios are described in [Annex XIII — Scenarios](#).

For each scenario, tenderers must provide a detailed and factual document of a maximum of 5,000 words and 12 pages, presenting the tenderer's approach with regard to the scope of the scenario. (Only the most restrictive of the limits will be considered and, therefore, text beyond the specified length will not be taken into consideration. Tenderers are requested to provide the information covering all the aspects included in the call for tender but avoiding documents including additional elements. Clarity and concision will be highly appreciated.)

The document shall cover at least the following:

- a description of the proposed **approach for undertaking the tasks of the scenario**;



- a description of the **quality assurance and control procedure**;
- a detailed **project plan including**:
 - A Work Breakdown Structure of the tasks;
 - A table with the budget items using Annex XII — Forms for financial tender.



4.3 Part C — financial offer (by lot)

Tenderers are requested to duly complete and submit the financial form included in [Annex XII — Forms for financial tender](#).

These offers are based on the estimated yearly budget and the scenario budgets. Regarding the price for Lots 1 and 2, please note that, for the same profile, there will be two different prices as follows:

- on-site (at EU-OSHA);
- off-site (tenderers' premises).

The financial offers must be presented **in a paper version and in an electronic version** (USB memory stick or equivalent).

4.4 Double envelope system

The documentation will be produced using, or compatible with, Microsoft Office documents (word and excel for the tender), PDF and JPG (for visual requested in the scenarios) and provided in digital format (USB stick or equivalent) and in printed format.

The tender must be placed inside two sealed envelopes addressed as indicated below.

The **outer envelope** should state the address for submission of the tenders (see section [4.5 - Postal and electronic address](#)). The date of posting should be legible on the outer envelope.

The **inner envelope** should be marked as follows: 'CALL FOR TENDERS — NOT TO BE OPENED BY THE INTERNAL MAIL DEPARTMENT' and should include the following information:

- the **reference number** of the tender: EUOSHA/2018/OP/F/SE/0060;
- the **lot number**;
- the **project title**: ICT and web services;
- the **name of the tenderer**.

The inner envelope must also contain four sealed envelopes and a USB memory stick:

- **Envelope A1**: Administrative part and supporting documentation (common to all lots): one original;
- **Envelope A2**: Supporting documentation for the selection criteria (by lot): one original;
- **Envelope B**: Technical offer (by lot): one original (on paper, unbound, clearly marked 'Original' and each page to be signed/initialled), two copies (on paper, bound and each marked as 'Copy') as requested in section [4.2 - Part B — technical offer \(by lot\)](#);
- **Envelope C**: Financial offer (by lot): one original (on paper, unbound, clearly marked 'Original' and each page to be signed/initialled), two copies (on paper, bound and each marked as 'Copy') and an electronic copy (USB memory stick or equivalent) as requested in section [4.3 - Part C — financial offer \(by lot\)](#).
- **USB memory stick**: Electronic versions of all documents above Part A1, A2, B and C (the part C must contain at least the tables in Excel format or equivalent).



4.5 Postal and electronic address

European Agency for Safety and Health at Work
Calle Santiago de Compostela, 12 — 5th Floor (Edificio Miribilla)
48003 Bilbao - Spain
E-mail: cft0060@osha.europa.eu

4.6 Date for submission

The tender should be postmarked **no later than** the date indicated in the timetable in section 1.3 - Time schedule for this tender and as stated in the invitation to tender.



5 Assessment and award of the contract

Tenders will be opened and evaluated by persons possessing the technical and administrative capacities necessary to give an informed opinion on the tenders. Members of the opening and evaluation panel are nominated on a personal basis by EU-OSHA under guarantee of impartiality and confidentiality.

5.1 Opening session

The main aim of the opening session is to check whether the tender received is compliant with the following formal requirements:

1. The tender was submitted not later than the submission deadline.
2. The envelope containing the tender is sealed.

EU-OSHA reserves the right to exclude tenders that fail to comply with any of the abovementioned requirements.

The opening session will take place on the date indicated in the time schedule in section [1.3 - Time schedule for this tender](#) at EU-OSHA's premises. Tenderers wishing to attend the opening session must follow the indications stated in the invitation to tender (section 7).

5.2 Evaluation of the tenders

The evaluation procedure is confidential. The evaluation committee's deliberations are held in closed sessions and its decisions are collective.

Tenders complying with the formal requirements checked during the opening session will be evaluated in three stages, in the following order:

1. The evaluation committee will evaluate and award a score for each tender according to the best quality/price ratio ([5.2.8 - Award](#)) taking the following into account:
 - The evaluation committee will evaluate first the technical tender (Part B) without seeing the financial tender (Part C)
 - Each criteria will be assessed in the order presented in the sections 5.2.1, 5.2.2, 5.2.3 and 5.2.4;
 - Each criteria has a minimum score (50%). If a tender is scored below the minimum in one criteria, the tender will be considered unsuccessful as not presenting the required minimum quality level;
 - In addition to the minimum score by criteria, a minimum score will apply (60%) on the total score of "Quality of service, project management and quality assurance", "Quality of the Service level Agreement" and "Quality of scenarios". If a tender is scored below the minimum in one of the totals, the tender will be considered unsuccessful as not presenting the required minimum quality level;
 - Tenderers should elaborate on all points in order to score as many points as possible. Offers that merely repeat the mandatory requirements set out in these specifications, without going into detail or without giving any added value, will be scored very low.
 - The evaluation committee will evaluate then the financial offer (part C) of tenders that have reached the minimum score in their technical part.
2. The evaluation committee will assess the eligibility of the best ranked tender according to the exclusion criteria in section [5.2.6 - Exclusion criteria \(each lot\)](#). If the best ranked tender is not eligible, the evaluation committee will assess the second ranked tender. If the second ranked tender is neither eligible, the evaluation will assess the third ranked tender, etc.
3. The evaluation committee will assess then the capacity to perform the contract of the best ranked tender in view of the selection criteria in section [5.2.7 - Selection criteria \(each lot\)](#). If the best ranked



tender is not eligible, the evaluation committee will assess the second ranked tender. If the second ranked tender is neither eligible, the evaluation will assess the third ranked tender, etc.

5.2.1 Technical evaluation (Lot 1)

Quality of service, project management and quality assurance

Award criteria	Information to be provided for this lot	Score
Quality of the approach for delivering the services	The tenderer will explain in detail how they will manage the different type of services described in section 2.1.2 - Services.	200 (min. 100)
Quality of the Project Management approach	The project management methodology must follow EU-OSHA's methodological approach. The tenderer will explain in detail the methods that will be used to ensure that they can respond professionally and in a timely manner to any type of request for services described in this lot. The approach must be relevant and stringent, including the work planning schedule.	100 (min. 50)
Quality of the team organisation and the continuity of service	The tenderer will explain concisely but in detail how the methodology will guarantee a consistently high level of services and maximum efficiency in terms of cost, speed and quality of the services, as they have been described in the tender specifications. The description will demonstrate how to guarantee sufficient resources for the continuity of the service offered and the quality of the services necessary for the proper performance including how the structure of the team will be flexible enough to accommodate peak loads. It will also include a description of on-site (in Agency premises) and off-site tasks. The information provided will explain how the tenderer will track the schedule set for the project teams avoiding overload in the work and comply with the deadlines specified.	100 (min. 50)
Quality assurance and control procedures	The tenderer should describe expected communication flows with the Agency. The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance.	100 (min. 50)
Quality of the continuous improvement plans	The tenderer should demonstrate, through examples or lessons learned how, the accomplishment of project goals will be ensured and how improvement plans will be implemented. This description should also explain how improvement in the processes will be evaluated. The tenderer will explain the main challenges that may occur during such activity. Solutions to anticipated problems should be proposed.	50 (min. 25)
Quality of the data protection approach	The tenderer is expected to provide an approach for the data protection model explaining how he will adopt appropriate technical and organisational security measures having regard to the risks inherent to the processing and to the nature of the personal data concerned.	50 (min. 25)
Guarantee of the technical expertise	The tenderer must explain how they will guarantee the expertise in technologies used by EU-OSHA.	150 (min. 75)
Efficiency of development process	The tenderer must explain its development process including the continuous integration such as versioning, quality code, automatic testing, build of packages, deployment...	200 (min. 100)
Pertinence of the methodology for estimates	The tenderer must explain which methodology and tools will be used to provide estimates.	50 (min. 25)
Total score		1000 (min. 600)



Quality of the Service level Agreement

Award criteria	Information to be provided for this lot	Score
Quality of the approach to meet the terms of the SLA	The tenderer will explain the approach to meet the terms of the SLA, in particular how they will respect the metrics defined in the document.	300 (min. 150)
Quality of the SLA's improvement	The tenderer will propose improvements (for EU-OSHA) that could be made in the draft SLA.	200 (min. 100)
Total score		500 (min. 300)

Quality of scenarios

The description of the scenarios can be found in [Annex XIII — Scenarios](#).

- **Scenario 1 - Phase-in / Phase-out (Lot 1, 2 and 3)**

Award criteria	Information to be provided for this lot	Score
Quality and relevance of the proposed approach	The tenderer will explain in detail how they will manage the different type of tasks described in the scenario.	80 (min. 40)
Quality of the project plan	Project plan detailing how to undertake the tasks. The tenderer will provide: <ul style="list-style-type: none"> • A Work Breakdown Structure of the tasks; • A table with the budget items including the person-days per profile; 	60 (min. 30)
Quality assurance and control procedures	The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance of the scenario.	60 (min. 30)
Quality of the cooperation with other contractors	The tenderer will explain the collaboration with other contractors.	60 (min. 30)
Clarity and consistency	The tender should demonstrate its ability to answer the future request of services in a clear and consistent manner.	40 (min. 20)
Total score		300 (min. 180)



• **Scenario 2 Maintenance of PLONE Applications and OSHWiki (Lot 1)**

Award criteria	Information to be provided for this lot	Score
Quality and relevance of the proposed approach	The tenderer will explain in detail how they will manage the different type of tasks described in the scenario.	80 (min. 40)
Quality of the project plan	Project plan detailing how to undertake the tasks. The tenderer will provide: <ul style="list-style-type: none"> • A Work Breakdown Structure of the tasks; • A table with the budget items including the person-days per profile; 	60 (min. 30)
Quality assurance and control procedures	The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance of the scenario.	60 (min. 30)
Quality of the approach to meet the terms of the SLA	The tenderer will explain the approach to meet the terms of the SLA for this scenario.	60 (min. 30)
Clarity and consistency	The tender should demonstrate its ability to answer the future request of services in a clear and consistent manner.	40 (min. 20)
Total score		300 (min. 180)

• **Scenario 3 - A spell checker to OiRA's editor (Lot 1)**

Award criteria	Information to be provided for this lot	Score
Quality and relevance of the proposed approach	The tenderer will explain in detail how they will manage the different type of tasks described in the scenario.	90 (min. 45)
Quality of the project plan	Project plan detailing how to undertake the tasks. The tenderer will provide: <ul style="list-style-type: none"> • A Work Breakdown Structure of the tasks; • A table with the budget items including the person-days per profile; 	90 (min. 45)
Quality assurance and control procedures	The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance of the scenario.	90 (min. 45)
Multilingual coverage	In terms of number of languages and assets like integration and grammar checks.	90 (min. 45)
Clarity and consistency	The tender should demonstrate its ability to answer the future request of services in a clear and consistent manner.	40 (min. 20)
Total score		400 (min. 240)

Score

The technical score for each lot will be calculated by adding the score obtained for:

- Quality of service, project management and quality assurance;
- Quality of the Service level Agreement;
- Quality of scenarios.



5.2.2 Technical evaluation (Lot 2)

Quality of service, project management and quality assurance

Award criteria	Information to be provided for this lot	Score
Quality of the approach for delivering the services	The tenderer will explain in detail how they will manage the different type of services described in section 2.2.2 - Services.	200 (min. 100)
Quality of the Project Management approach	The project management methodology must follow EU-OSHA's methodological approach. The tenderer will explain in detail the methods that will be used to ensure that they can respond professionally and in a timely manner to any type of request for services described in this lot. The approach must be relevant and stringent, including the work planning schedule.	100 (min. 50)
Quality of the team organisation and the continuity of service	The tenderer will explain concisely but in detail how the methodology will guarantee a consistently high level of services and maximum efficiency in terms of cost, speed and quality of the services, as they have been described in the tender specifications. The description will demonstrate how to guarantee sufficient resources for the continuity of the service offered and the quality of the services necessary for the proper performance including how the structure of the team will be flexible enough to accommodate peak loads. It will also include a description of on-site (in Agency premises) and off-site tasks. The information provided will explain how the tenderer will track the schedule set for the project teams avoiding overload in the work and comply with the deadlines specified.	100 (min. 50)
Quality assurance and control procedures	The tenderer should describe expected communication flows with the Agency. The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance.	100 (min. 50)
Quality of the continuous improvement plans	The tenderer should demonstrate, through examples or lessons learned how, the accomplishment of project goals will be ensured and how improvement plans will be implemented. This description should also explain how improvement in the processes will be evaluated. The tenderer will explain the main challenges that may occur during such activity. Solutions to anticipated problems should be proposed.	50 (min. 25)
Quality of the data protection approach	The tenderer is expected to provide an approach for the data protection model explaining how he will adopt appropriate technical and organisational security measures having regard to the risks inherent to the processing and to the nature of the personal data concerned.	50 (min. 25)
Guarantee of the technical expertise	The tenderer must explain how he will guarantee the expertise in technologies used by EU-OSHA.	150 (min. 75)
Efficiency of development process	The tenderer must explain its development process including the continuous integration such as versioning, quality code, automatic testing, build of packages, deployment...	200 (min. 100)
Pertinence of the methodology for estimates	The tenderer must explain which methodology and tools will be used to provide estimates.	50 (min. 25)
Total score		1000 (min. 600)



Quality of the Service level Agreement

Award criteria	Information to be provided for this lot	Score
Quality of the approach to meet the terms of the SLA	The tenderer will explain the approach to meet the terms of the SLA, in particular how they will respect the metrics defined in the document.	300 (min. 150)
Quality of the SLA's improvement	The tenderer will propose improvements (for EU-OSHA) that could be made in the draft SLA	200 (min. 100)
Total score		500 (min. 300)

Quality of scenarios

The description of the scenarios can be found in [Annex XIII — Scenarios](#).

- **Scenario 1 - Phase-in / Phase-out (Lot 1, 2 and 3)**

Award criteria	Information to be provided for this lot	Score
Quality and relevance of the proposed approach	The tenderer will explain in detail how they will manage the different type of tasks described in the scenario.	80 (min. 40)
Quality of the project plan	Project plan detailing how to undertake the tasks. The tenderer will provide: <ul style="list-style-type: none"> • A Work Breakdown Structure of the tasks; • A table with the budget items including the person-days per profile; 	60 (min. 30)
Quality assurance and control procedures	The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance of the scenario.	60 (min. 30)
Quality of the cooperation with other contractors	The tenderer will explain the collaboration with other contractors.	60 (min. 30)
Clarity and consistency	The tender should demonstrate its ability to answer the future request of services in a clear and consistent manner.	40 (min. 20)
Total score		300 (min. 180)



• **Scenario 4 - Maintenance of Microsoft Applications (Lot 2)**

Award criteria	Information to be provided for this lot	Score
Quality and relevance of the proposed approach	The tenderer will explain in detail how they will manage the different type of tasks described in the scenario.	80 (min. 40)
Quality of the project plan	Project plan detailing how to undertake the tasks. The tenderer will provide: <ul style="list-style-type: none"> • A Work Breakdown Structure of the tasks; • A table with the budget items including the person-days per profile; 	60 (min. 30)
Quality assurance and control procedures	The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance of the scenario.	60 (min. 30)
Quality of the approach to meet the terms of the SLA	The tenderer will explain the approach to meet the terms of the SLA for this scenario.	60 (min. 30)
Clarity and consistency	The tender should demonstrate its ability to answer the future request of services in a clear and consistent manner.	40 (min. 20)
Total score		300 (min. 180)

• **Scenario 5 - Migration Dynamics CRM 2013 to Dynamics 365 (Lot 2)**

Award criteria	Information to be provided for this lot	Score
Quality and relevance of the proposed approach	The tenderer will explain in detail how they will manage the different type of tasks described in the scenario.	90 (min. 45)
Quality of the project plan	Project plan detailing how to undertake the tasks. The tenderer will provide: <ul style="list-style-type: none"> • A Work Breakdown Structure of the tasks; • A table with the budget items including the person-days per profile; 	90 (min. 45)
Quality assurance and control procedures	The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance of the scenario.	90 (min. 45)
Quality of the data protection approach	The tenderer is expected to provide an approach for the data protection model explaining how he will adopt appropriate technical and organisational security measures having regard to the risks inherent to the processing and to the nature of the personal data concerned.	90 (min. 45)
Clarity and consistency	The tender should demonstrate its ability to answer the future request of services in a clear and consistent manner.	40 (min. 20)
Total score		400 (min. 240)

Score

The technical score for each lot will be calculated by adding the score obtained for:

- Quality of service, project management and quality assurance;
- Quality of the Service level Agreement;
- Quality of scenarios.



5.2.3 Technical evaluation (Lot 3)

Quality of service, project management and quality assurance

Award criteria	Information to be provided for this lot	Score
Quality of the approach for delivering the services	The tenderer will explain in detail how they will manage the different type of services described in section 2.3.2 - Services.	200 (min. 100)
Quality of the Project Management approach	The project management methodology must follow EU-OSHA's methodological approach. The tenderer will explain in detail the methods that will be used to ensure that they can respond professionally and in a timely manner to any type of request for services described in this lot. The approach must be relevant and stringent, including the work planning schedule.	50 (min. 25)
Quality of the team organisation and the continuity of service	The tenderer will explain concisely but in detail how the methodology will guarantee a consistently high level of services and maximum efficiency in terms of cost, speed and quality of the services, as they have been described in the tender specifications. The description will demonstrate how to guarantee sufficient resources for the continuity of the service offered and the quality of the services necessary for the proper performance including how the structure of the team will be flexible enough to accommodate peak loads. It will also include a description of on-site (in Agency premises) and off-site tasks. The information provided will explain how the tenderer will track the schedule set for the project teams avoiding overload in the work and comply with the deadlines specified.	100 (min. 50)
Quality assurance and control procedures	The tenderer should describe expected communication flows with the Agency. The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance.	50 (min. 25)
Quality of the continuous improvement plans	The tenderer should demonstrate, through examples or lessons learned how, the accomplishment of project goals will be ensured and how improvement plans will be implemented. This description should also explain how improvement in the processes will be evaluated. The tenderer will explain the main challenges that may occur during such activity. Solutions to anticipated problems should be proposed.	50 (min. 25)
Quality of the data protection approach	The tenderer is expected to provide an approach for the data protection model explaining how he will adopt appropriate technical and organisational security measures having regard to the risks inherent to the processing and to the nature of the personal data concerned.	50 (min. 25)
Guarantee of infrastructure support	The tenderer is expected to describe how the infrastructure will guarantee to be dimensioned and adapted to cope with the needs of the Agency hosted websites.	200 (min. 100)
Quality of the Disaster Recovery Process	The tenderer is expected to describe the Disaster Recovery Process to be applied to the infrastructure used for the Agency hosted websites.	150 (min. 75)
Efficiency of the hotline and monitoring process	The tenderer is expected to describe how dimensioning of the hotline service depending on demand will be achieved. Moreover, the tenderer should explain in detail how the proposed tools will improve the quality of service of the hotline and how they will help in dimensioning the service.	100 (min. 50)
Quality of the green hosting solutions	The tenderer will detail how green hosting activities will be included in the service (using renewable energy, energy savings...).	50 (min. 25)
Total score		1000 (min. 600)



Quality of the Service level Agreement

Award criteria	Information to be provided for this lot	Score
Quality of the approach to meet the terms of the SLA	The tenderer will explain the approach to meet the terms of the SLA, in particular how they will respect the metrics defined in the document.	300 (min. 150)
Quality of the SLA's improvement	The tenderer will propose improvements (for EU-OSHA) that could be made in the draft SLA	200 (min. 100)
Total score		500 (min. 300)

Quality of scenarios

The description of the scenarios can be found in [Annex XIII — Scenarios](#).

- **Scenario 1 - Phase-in / Phase-out (Lot 1, 2 and 3)**

Award criteria	Information to be provided for this lot	Score
Quality and relevance of the proposed approach	The tenderer will explain in detail how they will manage the different type of tasks described in the scenario.	140 (min. 70)
Quality of the project plan	Project plan detailing how to undertake the tasks. The tenderer will provide: <ul style="list-style-type: none"> • A Work Breakdown Structure of the tasks; • A table with the budget items including the person-days per profile; 	100 (min. 50)
Quality assurance and control procedures	The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance of the scenario.	100 (min. 50)
Quality of the cooperation with other contractors	The tenderer will explain the collaboration with other contractors.	100 (min. 50)
Clarity and consistency	The tender should demonstrate its ability to answer the future request of services in a clear and consistent manner.	60 (min. 30)
Total score		500 (min. 300)



• **Scenario 6 - New website deployment (Lot 3)**

Award criteria	Information to be provided for this lot	Score
Quality and relevance of the proposed approach	The tenderer will explain in detail how they will manage the different type of tasks described in the scenario.	140 (min. 70)
Quality of the project plan	Project plan detailing how to undertake the tasks. The tenderer will provide: <ul style="list-style-type: none"> • A Work Breakdown Structure of the tasks; • A table with the budget items including the person-days per profile; 	100 (min. 50)
Quality assurance and control procedures	The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance of the scenario.	100 (min. 50)
Flexibility of the process	The tenderer will explain how often and during which time frame the process could be executed.	100 (min. 50)
Clarity and consistency	The tender should demonstrate its ability to answer the future request of services in a clear and consistent manner.	60 (min. 30)
Total score		500 (min. 300)

Score

The technical score for each lot will be calculated by adding the score obtained for:

- Quality of service, project management and quality assurance;
- Quality of the Service level Agreement;
- Quality of scenarios.



5.2.4 Technical evaluation (Lot 4)

Quality of service, project management and quality assurance

Award criteria	Information to be provided for this lot	Score
Quality of the approach for delivering the services	The tenderer will explain in detail how they will manage the different type of services described in section 2.4.2 - Services.	200 (min. 100)
Quality of the Project Management approach	The project management methodology must follow EU-OSHA's methodological approach. The tenderer will explain in detail the methods that will be used to ensure that they can respond professionally and in a timely manner to any type of request for services described in this lot. The approach must be relevant and stringent, including the work planning schedule.	100 (min. 50)
Quality of the team organisation and the continuity of service	The tenderer will explain concisely but in detail how the methodology will guarantee a consistently high level of services and maximum efficiency in terms of cost, speed and quality of the services, as they have been described in the tender specifications. The description will demonstrate how to guarantee sufficient resources for the continuity of the service offered and the quality of the services necessary for the proper performance including how the structure of the team will be flexible enough to accommodate peak loads. It will also include a description of on-site (in Agency premises) and off-site tasks. The information provided will explain how the tenderer will track the schedule set for the project teams avoiding overload in the work and comply with the deadlines specified.	100 (min. 50)
Quality assurance and control procedures	The tenderer should describe expected communication flows with the Agency. The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance.	100 (min. 50)
Quality of the continuous improvement plans	The tenderer should demonstrate, through examples or lessons learned how, the accomplishment of project goals will be ensured and how improvement plans will be implemented. This description should also explain how improvement in the processes will be evaluated. The tenderer will explain the main challenges that may occur during such activity. Solutions to anticipated problems should be proposed.	50 (min. 25)
Quality of the data protection approach	The tenderer is expected to provide an approach for the data protection model explaining how they will adopt appropriate technical and organisational security measures having regard to the risks inherent to the processing and to the nature of the personal data concerned.	50 (min. 25)
Quality of the expert and tester selection	The tenderer will explain the approach for the selection of experts and testers.	200 (min. 100)
Quality of usability studies, metrics and tools	The tenderer is expected to specify how the metrics and specific tools proposed will ensure the success of the service.	200 (min. 100)
Total score		1000 (min. 600)



Quality of the Service level Agreement

Award criteria	Information to be provided for this lot	Score
Quality of the approach to meet the terms of the SLA	The tenderer will explain the approach to meet the terms of the SLA, in particular how they will respect the metrics defined in the document.	300 (min. 150)
Quality of the SLA's improvement	The tenderer will propose improvements (for EU-OSHA) that could be made in the draft SLA	200 (min. 100)
Total score		500 (min. 300)

Quality of scenarios

The description of the scenarios can be found in [Annex XIII — Scenarios](#).

- **Scenario 7 for lot 4**

Award criteria	Information to be provided for this lot	Score
Quality and relevance of the proposed approach	The tenderer will explain in detail how they will manage the different type of tasks described in the scenario.	400 (min. 200)
Quality of the project plan	Project plan detailing how to undertake the tasks. The tenderer will provide: <ul style="list-style-type: none"> • A Work Breakdown Structure of the tasks; • A table with the budget items including the person-days per profile; 	200 (min. 100)
Quality assurance and control procedures	The information provided will demonstrate the reliability of control mechanisms of work performed and testing approach for quality assurance of the scenario.	200 (min. 100)
Pertinence of the expected improvements	The tenderer will explain and justify the expected improvements derived from the usability study.	100 (min. 50)
Clarity and consistency	The tender should demonstrate its ability to answer the future request of services in a clear and consistent manner.	100 (min. 50)
Total score		1000 (min. 600)

Score

The technical score for each lot will be calculated by adding the score obtained for:

- Quality of service, project management and quality assurance;
- Quality of the Service level Agreement;
- Quality of scenarios.



5.2.5 Financial evaluation (each lot)

EU-OSHA will use the reference prices submitted by the tenderers, by lot, as defined in Annex XII — Forms for financial tender.

Only these reference prices will be taken into account when awarding the contract as follows:

$$\text{Financial score} = (\text{Lowest price/Price}) \times 2500$$

5.2.6 Exclusion criteria (each lot)

Evaluators will examine the tender having been ranked the best in the previous phase (technical and financial evaluations).

EU-OSHA shall accept a signed Declaration of honour as satisfactory evidence that the tenderer is not in one of the situations described in the Declaration of honour (Annex II — Declaration of honour).

After the award and prior to the signature of the contract, the awarded tenderer shall furnish, within a time-limit specified by the awarding authority, the additional documentation that is described in the Declaration.

5.2.7 Selection criteria (each lot)

The Evaluation Committee will assess the capacity to perform the contract of the best ranked tender of the previous phases (technical and financial evaluation and having passed the exclusion criteria) through the documentation of Part A1 and A2.

The evaluation committee will examine the tender to ensure that the information requested in the selection criteria has been provided and that the tenderer fulfils all these criteria.

Administrative capacity (for all lots)

Tenderers have to prove that they are authorised to perform the contract under national law, as evidenced by a power of attorney and by inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, express authorisation or entry in the VAT register (see Annex III — Legal entity form, Annex IV — Financial identification form and Annex V — Administrative form).

Economic and financial capacity (for each lot)

Proof of economic and financial capacity must be furnished by:

- a statement of overall turnover and turnover concerning the provision of tasks and services described for the last **3 financial years** (a statement concerning other types of services will not be taken into consideration) with:
 - a minimum of EUR 200,000 in Lot 1;
 - a minimum of EUR 200,000 in Lot 2;
 - a minimum of EUR 300,000 in Lot 3;
 - a minimum of EUR 160,000 in Lot 4.
- balance sheets for the last 3 years for which accounts have been closed and concerning the services described in these tender specifications;
- a declaration of a financial entity where the tenderer has its account certifying the absence of payments problems or debts with the bank or third parties.



Technical and professional capacity

The tenderer must demonstrate the ability to meet the following minimum requirements:

- a) appropriate organisational and staffing structure for the services required by EU-OSHA;
- b) a minimum of 3 years' experience of projects similar to the services described, acquired in the period 2015-2018, for clients in the public and private sector at national/international level;
- c) staff who are competent to carry out the services. The account manager and the main team members responsible for carrying out the project must have the appropriate educational qualifications and professional experience in the services required and an excellent level of working English.
- d) **Only for lot 3:** Appropriate facilities, technical equipment and material to carry out the services required under this lot.

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

For a)

- A concise company profile (maximum of 1,500 words), describing the tenderer's main current activities and demonstrating the ability to provide services similar to those communicated in each lot. Any other type of services presented will not be evaluated.
- A description of the firm's organisational structure (maximum of 1,500 words), including a statement of the average annual manpower and the number of managerial staff in the last 3 years. The tenderer must provide a description of the organisation and the hierarchy levels, as well as completing the following table (one for each lot) with the appropriate categories. Please note that it is provided as an example:

	Year 1	Year 2	Year 3
Directors	15	12	10
Managers	30	24	20
Senior Consultants

For b)

- A list of the principal services, similar to those described in each lot, that have been provided over the last 3 years, including the amount, the period and, where possible, the name of clients and the sector (public or private).
- A description and evidence of contracts or projects performed in the past 3 years, similar in scope, size and nature to those described in each lot:
 - A mapping of all PARFs presented using Annex IX — Mapping of PARFs
 - In order to prove this capacity, tenderers are requested to complete a PARF for each contract or project, indicating the precise type of work carried out, the date, the approximate value of the contract and the customer. The PARFs must demonstrate the tenderer's ability to deliver the services that form part of this call for tender. Tenderers are requested to use the template in Annex X — PARF.



The minimum requirements for the PARFs to be presented are:

	Number of PARFs	Minimum value for at least one of the PARFs
Lot 1	<p>Between three and five:</p> <ul style="list-style-type: none"> At least two for maintenance At least one for Plone technology 	EUR 50,000
Lot 2	<p>Between four and six:</p> <ul style="list-style-type: none"> At least two for maintenance At least two for developments At least one for Microsoft CRM technology At least one for Microsoft SharePoint technology 	EUR 50,000
Lot 3	<p>Between four and six:</p> <ul style="list-style-type: none"> At least one with Drupal technology At least one with Plone technology At least one with Java technology 	EUR 75,000
Lot 4	<p>Between three and five:</p> <ul style="list-style-type: none"> At least one with Usability expert review At least one with Wireframe At least one with User testing 	EUR 25,000

For c)

- A mapping of all CVs presented (see [Annex XI — Mapping of CVs](#)).
- Tenderers should supply the CVs of the account manager and of main team members who will be responsible for carrying out the project (maximum of 2 pages per team member), reflecting their capacity to meet the requirements stated in each lot. The CVs of the profiles assigned to the tasks only, as described below, will be taken into consideration in the evaluation of the tender.

The CVs must show evidence of the experience and necessary/relevant qualifications.

Tenderers are requested to use the European template, which can be downloaded at <http://europass.cedefop.europa.eu/en/documents/curriculum-vitae/templates-instructions>.

The CVs must show evidence of language skills (minimum of B2 level in English (written and spoken)).

The tenderer must provide at least the following profiles of expertise:

Profiles	Minimum number of years ⁴	Lot 1	Lot 2	Lot 3	Lot 4
Account Manager	5	✓ Account Manager	✓ Account Manager	✓ Account Manager	✓ Account Manager
Project or Service Manager	3	✓ Project Manager	✓ Project Manager	✓ Service Manager	✓ Project Manager

⁴ Minimum of required years **in the tasks described in this document for this profile**



Senior Consultant	4	<ul style="list-style-type: none"> ✓ Senior Consultant ✓ Senior Business Analyst 	<ul style="list-style-type: none"> ✓ Senior Consultant ✓ Senior Business Analyst 	<ul style="list-style-type: none"> ✓ Senior Architect 	<ul style="list-style-type: none"> ✓ Senior Consultant
Junior Consultant	1	<ul style="list-style-type: none"> ✓ Consultant ✓ Business Analyst ✓ Tester 	<ul style="list-style-type: none"> ✓ Consultant ✓ Business Analyst ✓ Tester 	<ul style="list-style-type: none"> ✓ Helpdesk ✓ Junior Architect 	<ul style="list-style-type: none"> ✓ Consultant

- Regarding the **Account manager**, the minimum requirements are:
 - solid knowledge of project management methodology
- Regarding the **Project or Service Managers**, the minimum requirements are:
 - solid knowledge of project management methodology
- Regarding the **Senior consultant**, the minimum requirements are:
 - solid expertise in the tasks required under each lot.

The selected tenderer must commit to maintaining a team as described in the technical offer for the whole period of the contract.

For d) Only for lot 3

- A short description of the firm's premises, facilities and connectivity, including a description of the technical equipment to be used to perform the tasks indicated in this lot.

Documents to provide in the case of tender by a consortium and/or subcontracting (for each lot):

In case of consortium

Each member of the consortium must provide evidence for:

- exclusion criteria and administrative data (see [Annex II — Declaration of honour](#), [Annex III — Legal entity form](#) and [Annex V — Administrative form](#));
- economic capacity (statement of overall turnover and turnover for the last 3 years);
- technical and professional capacity (concise company profile, list of main contracts).

In addition the tenderer should provide the [Annex VI — Consortium form](#) , duly completed.

The evidence provided by each member of the consortium will be checked to ensure that the consortium as a whole fulfils the criteria.

In case of subcontracting:

The tenderer must clearly indicate which parts of the work will be subcontracted and must give the identity of all subcontractors undertaking more than 10% of the work by value and provide the [Annex VII — Subcontracting form](#) duly completed.

Each subcontractor should present proof of exclusion criteria, economic, technical and professional capacity by providing:

- exclusion criteria and administrative data (see [Annex II — Declaration of honour](#), [Annex III — Legal entity form](#) and [Annex V — Administrative form](#));
- economic capacity (statement of overall turnover and turnover for the last 3 years for a minimum equivalent to the total value of subcontracted tasks during 2 years);
- a concise company profile, including a short description of the subcontractor's economic activity demonstrating the ability to provide the services that will be subcontracted to the company (maximum of 1,500 words), including its activity with regard to the scope of the lot;



- two contracts/projects performed in the last 3 years, similar in scope and nature to those that will be subcontracted. In order to prove this capacity, subcontractors are requested to complete two PARFs; PARFs should indicate the precise type of work carried out, the date, the human and financial resources used, the value of the contract and the client (public or private);
- detailed CV(s) of the subcontractors' staff related to the subcontracted tasks (for details on how to submit a CV, refer to 'CV specifications' above).

5.2.8 Award

The framework contracts will be awarded by lot to the most economically advantageous tender in accordance with the formula below. A weight of 60/40 is given to the quality/price.

$$\text{Final score} = (0.6 \times \text{quality score}) + (0.4 \times \text{financial score})$$



Annexes

- Annex IA — Checklist (common to all lots)**
- Annex IB — Checklist (for each lot)**
- Annex II — Declaration of honour**
- Annex III — Legal entity form**
- Annex IV — Financial identification form**
- Annex V — Administrative form**
- Annex VI — Consortium form**
- Annex VII — Subcontracting form**
- Annex VIII — Declaration of confidentiality and conflict of interest**
- Annex IX — Mapping of PARFs**
- Annex X — PARF**
- Annex XI — Mapping of CVs**
- Annex XII — Forms for financial tender**
- Annex XIII — Scenarios**
- Annex XIV — Draft SLA - Maintenance of Plone applications and OSHWiki (Lot 1)**
- Annex XV — Draft SLA - Maintenance of Microsoft applications (Lot 2)**
- Annex XVI — Draft SLA - Hosting services (Lot 3)**
- Annex XVII — Draft SLA - Usability services (Lot 4)**
- Annex XVIII — EU-OSHA 2018 Calendar**
- Annex XIX — List of EU-OSHA existing websites and applications**
- Annex XX — List of EU-OSHA Hosting Environments**
- Annex XXI — List of EU-OSHA tools**
- Annex XXII — EU-OSHA online strategy**
- Annex XXIII — Privacy statement**
- Annex XXIV — Confirmation of participation**