

Tender Procedure



Framework Contracts

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3. Tender Procedure - Preparation, Validation and Submission of the Offer

Once the Framework Contractor has accepted to participate in the tender submission by *expressing their willingness* and launching a *new submission*, a **draft submission** is automatically generated and is accessible directly from **"My Invitation(s)"**.

The Framework Contractor can therefore opt for the **same invitation** to **either**:

- **Continue to prepare** the **current submission**; **or**
- **Resume at a later stage** their **draft submission**; **or**
- **Start a new submission**.

To resume a **draft submission** (access/edit/delete) – figure below:

- Select **"My Invitation(s)"** (1) from the left main menu of the Funding & Tenders Portal;
- From the list of invitations on the **My Invitation(s)** page, click the **"Show submissions"** button (2) of the appropriate invitation, and the **draft submission** (3) will expand below the invitation;
- Click on the **"Action"** button (4) of the draft submission, and then select the required action (view/edit/delete) option (5) from the dropdown menu.

Invitation ID	Company	Start Date	End Date	Status	Actions
SIEA-2018-2458	Company A	03/10/2019 11:14:30 UTC+02:00	16/10/2019 11:14:30 UTC+02:00	Accepted	show submission (2)
SIEA-2018-2457	Company A	03/10/2019 10:54:36 UTC+02:00	16/10/2019 10:54:36 UTC+02:00	Draft	Action (4) dropdown: View (5), Edit, Delete show submission (3)

To start a **new submission** – figure below:

- Select **"My Invitation(s)"** (1) from the left main menu of the Funding & Tenders Portal;
- From the list of invitations on the **My Invitation(s)** page, click the **"Action"** button (2) of the appropriate invitation, and then select the **"Start New Submission"** option (3) from the dropdown menu.

<div>My Contract(s)</div> <div>My Invitation(s) 1</div> <div>My Formal Notification(s)</div>	SIEA-2018-2458	Company A	03/10/2019 11:14:30 UTC+02:00	16/10/2019 11:14:30 UTC+02:00	Accepted	<div> <div>2</div> <div>Action</div> <div>View Willingness</div> <div>Start New Submission 3</div> <div>Invitation Consortium</div> </div>	show submissior 1
	SIEA-2018-2457	Company A	03/10/2019 10:54:36 UTC+02:00	16/10/2019 10:54:36 UTC+02:00	Acco		show submissior 1

You may also at any stage of a submission simply select the “**View Willingness**” option of the invitation, and in the **eSubmission service** panel of the invitation details choose to either create a “**New submission**”, or “**Resume draft**” of the draft submission.

e-Submission service

On 02/10/2019 at 14:52:39 you have expressed your willingness to make a submission for the procedure SIEA-2018-2458

The e-Submission service of the European Commission allows participants to prepare and submit their responses to procedures electronically in a structured and secure way.

i Make sure that you read the [System Requirements](#) before you start, and that you submit on time.

☒ Yes, I have read and I accept the [Terms and Conditions](#) and I acknowledge that I have read and understood the [Data Protection Notice](#)

New submission

Resume draft

Submission ID: 300007351

If you choose to *resume the draft submission*, you will automatically be redirected to the stage of the submission that you last completed for the **draft submission**.

If you choose to *create a new submission*, the new submission will automatically **replace** (override) the previous draft submission.

3.1 Tender Procedure – Steps

The eSubmission **tender process** is divided into multiple steps to facilitate the submission of the offers for tender by the selected Framework Contractors. Not all steps are required as **not all are relevant** to *Request for Services* launched under Framework Contracts, nor to the *Framework Contract* and/or *procedure type*.

Preparation

- **Parties** – identification of the participant(s)
- **Tender Data** – formulation of the financial offer/breakdown and uploading of required documents

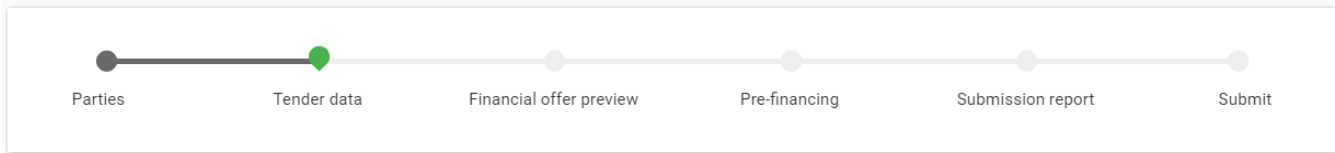
Validation

- **Financial Offer Preview** – preview of the financial offer (**not for Framework Contracts AUDIT 2018 and EVENTS 2020**, as the Financial Breakdown is uploaded in the previous **Tender Data** step)
- **Pre-financing** – request pre-financing and bank guarantee requirements (**not for Framework Contract AUDIT 2018**, as the pre-financing is always 0% for AUDIT Contracts)

Submission

- **Submission Report** – generated summary report of submission and uploaded documents
- **Submit** – submission of the offer for tender

You may view the **current step** within the tender process from the *workflow graphic* situated at the top of the page.



✓ **Tip:** After completing a step, remember to click on the **"Save"** button at the bottom of the page to save your data. You may also navigate between the steps of the tender process by using the **"Next"** and **"Back"** buttons, also at the bottom of the page.

At any step, you have access to the invitation, procedure and submission details (deadline, documents, last saved, etc.) in the two side boxes.

Procedure

Procedure reference number

SIEA-2018-2...

Deadline

16/10/2019 11:14:30
UTC+02:00

12

 days left until closure

Submission ID: 300007351
Last saved: 03/10/2019
11:14:02 UTC+02:00

Submission d...

3.2 Prepare the Offer

3.2.1 Parties

Check the **identification of the participant(s)** in the tender submission for whether you are a sole submission or part of a consortium. If you are part of a consortium, the *consortium structure* will include information on the **Consortium Leader** and other members of the consortium, which is retrieved from the Framework Contract.



Please note that the *invitation to participate in the tender submission* is sent to **all** the Coordinator Contacts (**CoCos** or **PCoCos**) of the consortia. The **Consortium Leader** will coordinate with the Coordinator Contacts of the consortium, and nominate a Primary Coordinator Contact (**PCoCo**), who will submit the offer for the consortium. If a PCoCo has **not yet been nominated** for a consortium, the CoCo that initiates the submission procedure will automatically be designated as the PCoCo of the offer/tender for that consortium.

For more information on *roles and permissions*, please view [User Roles and Permissions](#).

Once you have verified the information on the participants, click on the “**Next**” button at the bottom of the page to continue to the **Tender Data** step.

3.2.2 Tender Data

The information entered in the **Tender data** page will be used to generate your **Financial Offer** of the *tender submission*, and includes the **expertise and fees** of the Expert(s), **required documents** (*Curriculum Vitae* and *Statement of Availability and Exclusivity* of the Expert(s), etc.), and any **other details and fee(s)**.

The type of information required is determined based on the *procedure type* (Specific Contract under Framework Contract – SIEA 2018, AUDIT 2018, PSF 2019, EVA 2020 and EVENTS 2020), as well as the *payment modality* (**Fee-based** or **Global Price**).



Please note that for Framework Contracts **AUDIT 2018**, **PSF 2019 (Lot 1 and 3)** and **EVA 2020**, the *payment modality* is **always** **Global Price**, so only view the [Global Price section](#) below (if the case).



WARNING: For the Framework Contracts **AUDIT 2018** and **EVENTS 2020** – No Financial Offers will be generated in the Funding and Tenders Portal for the Request for Service, as the Financial Offer (Financial Breakdown) is **uploaded directly** to the system as a document in the **Financial Breakdown** tab (please view [Document Upload](#) below).

Fee-Based

- **Fee(s) – Individual Expert per position**

Individual expert and/or team is the description of the requirements for either the profile per expert, or expertise per category, or expertise common to all, or a mix of profile and expertise.

- **Fee(s) – Expertise by a team**

Same as above, but for the whole expert team (i.e. **not** as per individual).

- **Lump Sum**

A fee-based Specific Contract may include activities paid based on lump sums. The **Lump Sum** is an estimated *provisional amount*. Examples of lump sums are studies, evaluations, organisation of events such as conferences and training sessions. The contractor will **not** be able to exceed the amount foreseen.

- **Incidental Expenditure**

Incidental expenditures will contain all the *reimbursables* (per diem, ticket flights, etc.). Incidental expenditures **must** be classified, and therefore defined by the object and quantity of the expenditure.

- **Expenditure Verification Provision**

The **Expenditure Verification Provision** is determined when an *Expenditure Verification Report* is required (not required by default). If required, the amount that should be reserved for the report is disclosed by the European Commission and cannot be modified. The *Verification Report* fixed template will also be uploaded to the **Request for Service**.

Global Price

- **Fee(s) – Individual Expert per position**

Individual expert and/or team is the description of the requirements for either the profile per expert, or expertise per category, or expertise common to all, or a mix of profile and expertise.

- **Fee(s) – Expertise by a team**


Same as above, but for the whole expert team (i.e. **not** as per individual).



For FWC AUDIT 2018 (Global Price only) – Only the *offer amount* is required. If taxes are to be charged to the Contracting Authority, then the *total taxes amount* must also be indicated (zero if exempt from taxes).

IMPORTANT NOTE:

For **Framework Contract EVA 2020**, the Contracting Authority always defines the Expertise composition as '**Fee(s) - Expertise by a team**' and adds Experts categories in the team's composition (as defined in *Terms of Reference B (ToR B)*).

Please note that it is currently **not possible** to customise the team's composition using the "+Add Line" button, however you can instead use the  button to **duplicate** and then define the Experts in the team.

Use the "Add line" button to add new lines, the **delete** and/or **duplicate line** icons to manage the encoded lines within the relevant sections, and **expand** and **collapse** arrows for more details in the relevant sections.

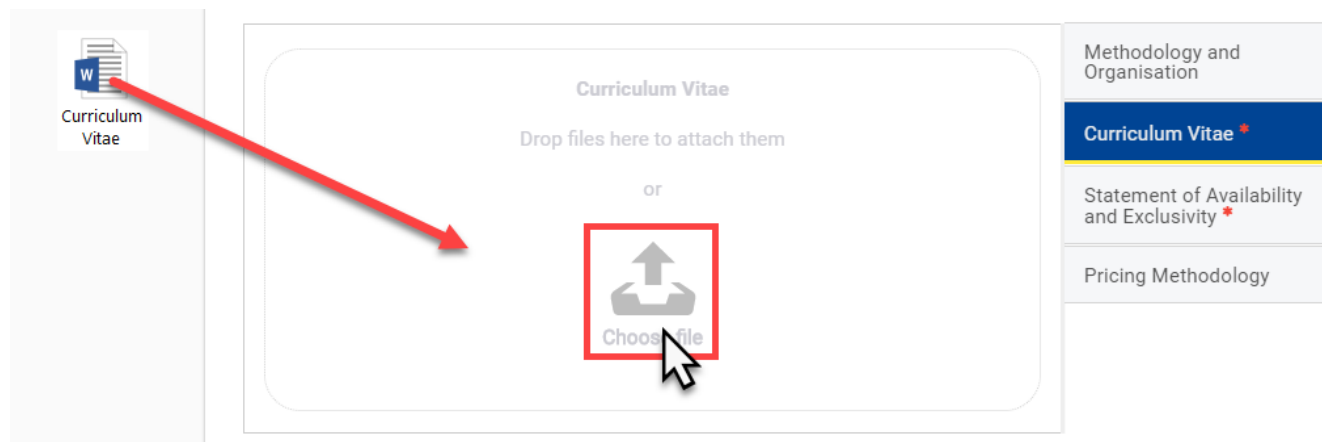


Document Upload

The required documents to be uploaded to the system depend on the Framework Contract. Please take special care when uploading documents, as you must **first select the appropriate document type (placeholder) before uploading** the document.

To upload the document, you can either *drag-and-drop* the file to the relevant upload zone, or click on the "Choose file" icon to open your computer's *file explorer* and select the file.

WARNING: Do not add any security methods to PDF files to be uploaded to the system (e.g. password protection, approval certifications, encryption certificates, security envelope, etc.). During the Contract Preparation phase, uploaded documents are *notarised* into ARES/ERIS by an automated technical process. *This process fails if the document is protected*, the **documents are not registered**, and the whole procedure will be blocked for this reason.



Please consult the table below for an overview of the required documents per Framework Contract:

**REMINDER:**

For Request for Services under Framework Contracts **AUDIT 2018** and **EVENTS 2020**, never add the Financial Offer (Financial Breakdown) to any other document to be uploaded to the system.

The Financial Breakdown of the offer must imperatively be uploaded in the designated "Financial Breakdown" tab!

Type of Document	Framework Contract				
	SIEA 2018	AUDIT 2018	PSF 2019	EVA 2020	EVENTS 2020
Methodology (including annexes)	Yes – unless stated otherwise in ToRs	No – unless requested in Request for Service	Yes – unless stated otherwise in ToRs	Yes	Yes
Composition of the Team (Organisation)	No	Yes	No	Yes	Yes
Curriculum Vitae (per expert)	Yes	Yes	Yes	Yes	Yes - only if Experts are requested/required
Statement of Availability and Exclusivity (SoEA – per expert)	Yes	No	Yes	Yes	No
Financial Offer (Financial Breakdown)	No - generated by the system	Yes	No - generated by the system	No - generated by the system	Yes
Pricing Methodology	Yes	No	No	No	No

Once you have verified the information and have uploaded the required documents, click on the **"Save"** button and then on the **"Next"** button at the bottom of the page to continue to the **Financial Offer Preview** step, or the **"Back"** button to modify any previous information.

3.3 Validate the Offer

3.3.1 Financial Offer Preview

The **Financial Offer Preview** will contain the details and breakdown of the *Financial Offer* including the *total amount*. Please verify that all the information and amounts entered for the composition of the *Financial Offer* are correct.



There is **no Financial Offer Preview** step for Framework Contracts **AUDIT 2018** and **EVENTS 2020**, as the *Financial Breakdown* is uploaded as a document in the previous **Tender Data** step.

Financial Offer Preview

If the financial offer is correct and complete, click on **Next** to proceed.

If you still want to change the financial offer, click on **Back** to navigate back to the Submission Data screen.

INDICATIVE FINANCIAL OFFER										
Request for Services:		SIEA-2018-2485								
Lot:		SIEA2018_Lot1								
Title:		Anitha Test 20091905								
Contractor		Company A								
Delegation in Charge:		--								
FEES in €										
Num.	Expert Name	Category	Position	Expert Fee	Management Fee	Total Fee	Quantity	Unit	Total Price	
1.0	test test	Cat. III (>3 years of experience)	Test	520.0	55.0	575.0	2.0	Working day(s)	1150.0	
						Total of Fees in €			1150.0	
Incidental Expenditure in €										
Num.	Type	Description				Unit Price	Quantity	Unit	Total Price	
						Total of Incidental expenditure in €			0.0	
						Grand total in €			1150.0	

Download Financial Offer Preview



< Back

Next >

Once you have verified the information, *download the offer* and click on the “**Next**” button at the bottom of the page to continue to the **Pre-financing** step, or the “**Back**” button to modify any previous information.

3.3.2 Pre-financing

Enter the requested **pre-financing amount** required for the services.



Please note that there is **no** Pre-financing step for **FWC AUDIT 2018**, as the pre-financing is **always 0%** for a Specific Contract under the Framework Contract AUDIT 2018.

The proposed and default pre-financing amount will be indicated, and is calculated based on your *Financial Offer* and the maximum pre-financing allowed based on the type of Framework Contract – set to **maximum 40%** of the offer for Framework Contracts **SIEA 2018**, **PSF 2019** and **EVA 2020**. The maximum pre-financing allowed under the Framework Contract **EVENTS 2020** is **20%**.

The request of a **bank guarantee** will also be indicated (if required).

You may also request a *lower* pre-financing amount than the suggested amount.

Pre-financing

Based on your financial offer, the default amount for pre-financing is **460.00€** (i.e **40%** of the price of your offer).

Because the default amount is lower than **300000€**; a bank guarantee is not required from your side.

However, you may want to request a lower amount.

Requested amount for pre-financing *

Save 

◀ Back

Next ▶

Once you have verified the information, click on the “**Save**” button and then on the “**Next**” button at the bottom of the page to continue to the **Submission Report** step, or the “**Back**” button to modify any previous information.

3.4 Submit the Offer

3.4.1 Submission Report

Please review the **Submission Report**. This report is generated by the system and contains a summary of the submission information the list of uploaded documents that you are about to submit.



Please note that the *Submission Report* is not a proof of submission, as you have *not yet confirmed submission*.

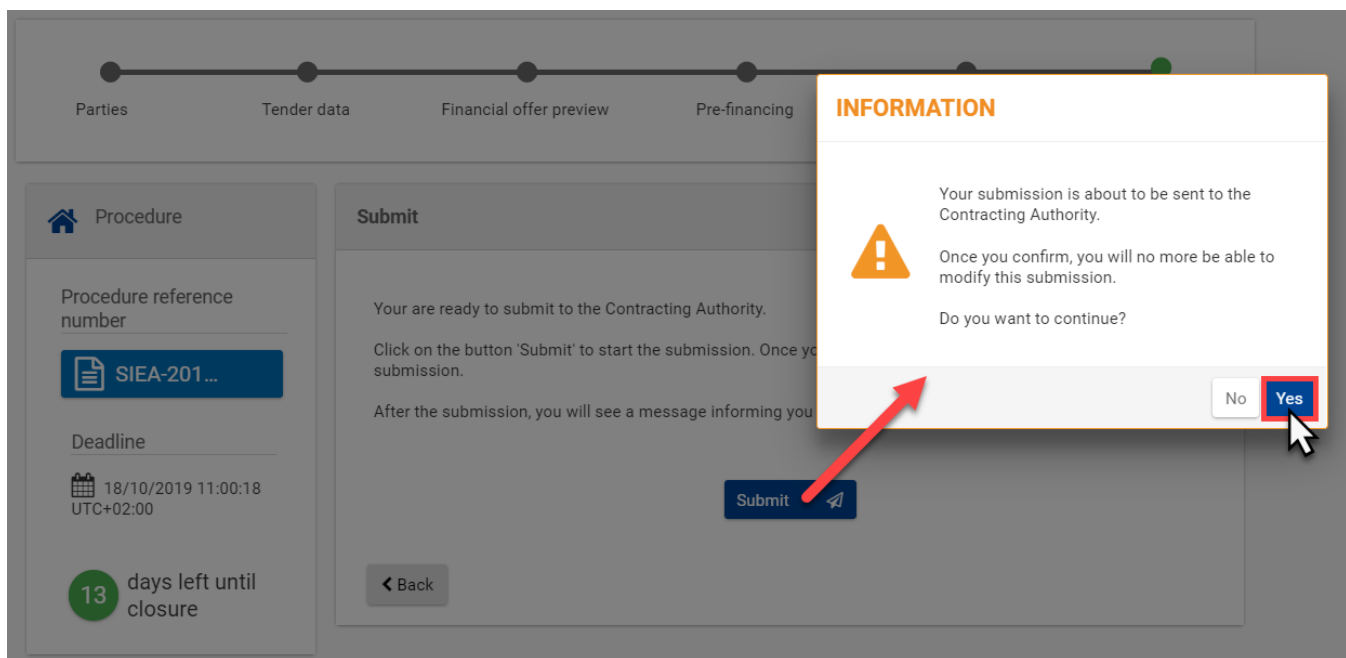
Once you have verified the information, click on the “**Next**” button at the bottom of the page to continue to the **Submit** step, or the “**Back**” button to modify any information.

3.4.2 Submit

Click on the “**Submit**” button when you are ready to submit your offer to the Contracting Authority. Click on the “**Yes**” button in the pop-up window to confirm your submission.



Please note that once you have confirmed submission, you will no longer be able to make any changes to the submission.



3.5 Status of Invitations and Submissions

The Framework Contractor can verify the **status of their invitation(s) and submission(s)** at any moment (if invitation received and submission created).

Status of Invitation

In **My Invitation(s)**, view the status of the invitation in the "**STATUS**" column of the list of invitations (if received).

Possible status for invitations are:

- **Received** - An *invitation was received* by the Contractor to participate in the tender submission;
- **Acknowledged** - The Contractor has *acknowledged the invitation* for the tender submission;
- **Accepted** - The Contractor has *expressed willingness to participate* in the tender submission;
- **Closed** - The invitation has closed as the *allocated time for submission has expired*.

PROCEDURE REFERENCE NUMBER	LOT	SUBMISSION ID	PARTICIPANT	TIME LIMIT TO EXPRESS WILLINGNESS	DEADLINE	DATE OF LAST ACTION	STATUS	ACTIONS
SIEA-2018			A-B-C Construction EF	25/02/2020 16:33:16 UTC+01:00	09/03/2020 04:33:16 UTC+01:00		Received	Action show submissions 0
SIEA-2018			A-B-C Construction EF	25/02/2020 16:33:16 UTC+01:00	09/03/2020 04:33:16 UTC+01:00		Accepted	Action show submissions 1
SIEA-2018			A-B-C Construction EF	25/02/2020 16:33:16 UTC+01:00	09/03/2020 04:33:16 UTC+01:00		Received	Action show submissions 0

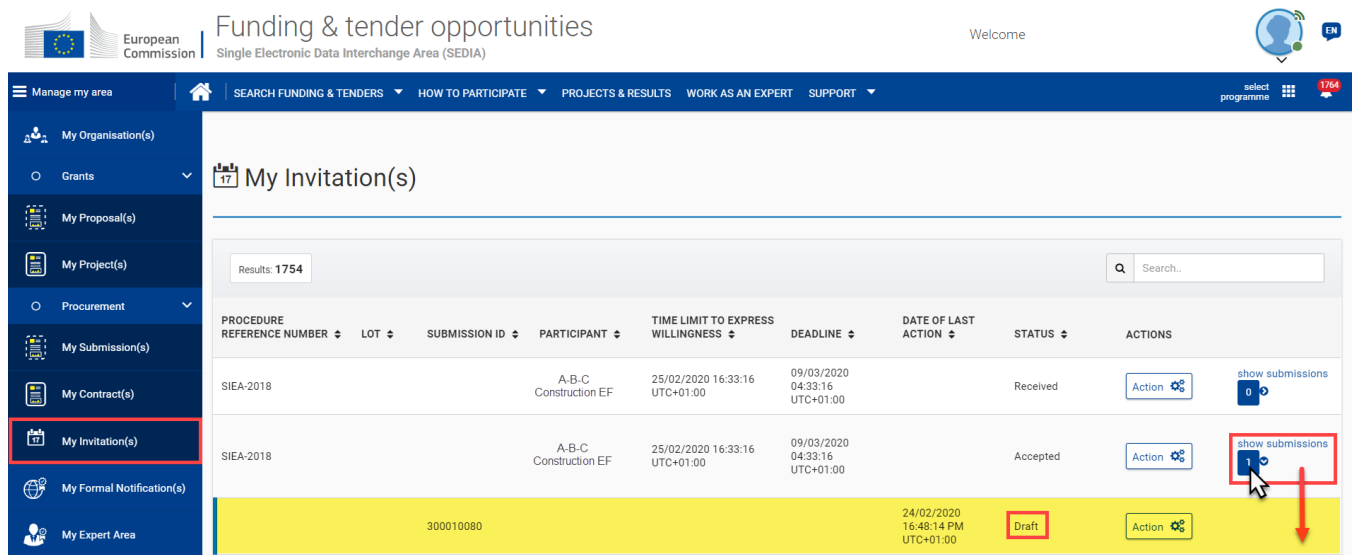
Status of Submission

In **My Invitation(s)**, click on the "**show submissions**" link of the relevant invitation. The *number* indicated shows if and the number of submissions that have been created for the respective invitation.

The invitation line will expand showing the related submission, and the status of the submission is displayed in the "**STATUS**" column for the relevant submission.

Possible status for submissions are:

- **Draft** - A draft submission has been created by the Contractor, *but has not yet been submitted*;
- **Deleted** - A draft submission has been created by the Contractor, *but has been deleted before being submitted*;
- **Submitted** - A submission has been created and *submitted by the Contractor*;
- **Withdrawn** - A submission has been created and submitted, *but has been withdrawn by the Contractor before the expiry of the allocated time for submission*.



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My Invitation(s)

Results: 1754

PROCEDURE REFERENCE NUMBER	LOT	SUBMISSION ID	PARTICIPANT	TIME LIMIT TO EXPRESS WILLINGNESS	DEADLINE	DATE OF LAST ACTION	STATUS	ACTIONS
SIEA-2018			A-B-C Construction EF	25/02/2020 16:33:16 UTC+01:00	09/03/2020 04:33:16 UTC+01:00		Received	Action show submissions 0
SIEA-2018			A-B-C Construction EF	25/02/2020 16:33:16 UTC+01:00	09/03/2020 04:33:16 UTC+01:00		Accepted	Action show submissions 1
		300010080				24/02/2020 16:48:14 PM UTC+01:00	Draft	Action

The status of submissions can also be viewed directly from **My Submission(s)** in the left main menu.

Acknowledgement and Willingness
Notifications