



EVROPSKÁ UNIE
EVROPSKÝ FOND PRO REGIONÁLNÍ ROZVOJ
INVESTICE DO VAŠÍ BUDOUCNOSTI



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Subject: Call for tenders for of a small scale

Contracting Authority: **Czech Republic – Ministry of Education, Youth and Sports**, with a seat in Karmelitská 7, Praha 1, 118 12, represented by Ms. Johana Burgetová, Head of Department of Technical Assistance, **calls** for submission of offers in a call for tenders entitled

“Elaboration of a methodology for evaluation of projects for Priority axes 1 and 2 of Operational Programme Research and Development for Innovation (OP R&DI) based on performance contracts”

The call for tenders is of a small scale according to § 12 para. 3 and § 18 para. 3 of Act no. 137/2006 Col., on public tenders, and of further amendments (further also referred to as „ZVZ“).

1. Subject of the tender:

1.1 Subject of the tender is a service:

- a) Elaboration of a methodology for evaluation of proposals submitted to the call for proposals under Priority axes 1 and 2 of OP R&DI, including recommendations for the structure of evaluation forms so that the evaluation corresponds as closely as possible to the structure of the performance contracts (or the conditions of implementation of projects) and could be used as a basis for specification of the target values set in the performance contracts; assistance and methodological guidance during the evaluation of projects.

- b) Elaboration of preliminary analysis of all the submitted project proposals to both of the Priority axes.

The output of this analysis shall be an overview of the thematic spread of the proposals, a summary information about the quality of presented proposals, a qualified estimate of the required number of evaluators in the required structure of thematic expertise and a proposal for distribution of proposals among the thematic groups of evaluators.

Part of the proposal shall be a specification of the time required for carrying out the preliminary analysis in the format of number of projects / manday.

1.2. Description

The operational programme Research and Development for Innovation (OP R&DI) is focused on strengthening the research, development and innovation potential of the Czech Republic that should, in turn, contribute to its economic growth, competitiveness and creation of highly qualified jobs so that the Czech regions become important concentrations of these activities in Europe. The contribution of Structural Funds to the OP R&DI exceeds 2.07 billion EUR and together with the national contribution the R&D for innovation in the Czech Republic will be supported by a sum exceeding 2.43 billion EUR.

In priority axis 1 (PA 1) is total allocation of 806 mil. EUR

In priority axis 2 (PA 2) is total allocation of 806 mil. EUR

The OP R&DI, the managing authority of which is the Ministry of Education, Youth and Sports of the Czech Republic, was approved by the Czech Government in April 2008, the technical negotiation with the European Commission, DG Regio, was finalised in July 2008 and the OP was signed by the European Commission on October 1, 2008.

In PA 1 and PA 2 a total of 3 calls are planned in the duration of the years 2008 and 2009 where in each of the calls an estimated 100 to 150 proposals are expected (two in PA 2 and one in PA 1) and in each is proposed 100 project.

Plan of calls is following:

1. In December 2008 the launching of a first call in PA 2 (with proposed allocation of 6 bil. CZK (approx. 240 million EUR) is foreseen with a closure between the first and second quarters of 2009
2. The launching of a first call for PA 1 (allocation of 16 bil. CZK, approx. 640 mil EUR) and a second call for PA2 (10 bil. CZK, approx. 400 mil EUR) is foreseen between the first and second quarters of 2009 with a closure expected between the third and fourth quarters of 2009.

The plan of the calls is subject to changes

The place of implementation of this tender is the Czech Republic.

2. Objective of the tender is:

- Elaboration of a methodology for evaluation of projects submitted under priority axes 1 (European Centres of Excellence) and 2 (Regional R&D Centres) so that the results of the evaluation can be transformed into binding, unambiguously specified and verifiable and enforceable parameters, the fulfilment of which will be legally binding for the beneficiary and will have a form of a performance contract. The methodology must reflect the basic objectives of the OP R&DI and the objectives of the individual priority axes, while the content of the performance contracts has to reflect the content of the evaluation criteria and target values of the monitoring indicators set for each of the priority axis of the OP R&DI. Part of the methodology will also be proposed method for carrying out the preliminary analysis of submitted project proposals.
- Report with a preliminary analysis of the submitted project proposals to both of the Priority axes with the objective to provide summary information about the thematic spread of proposals, their quality, including a proposal for the number and qualification structure of evaluators and a proposal for a distribution of project proposals into thematic groups of evaluators.

2.1 Output of the tender will be:

- Methodology for evaluation of proposals, including the prescribed structure of the evaluation forms
- Report with a preliminary analysis of proposals submitted under Priority axes 1 and 2, including a proposal for distribution of proposals for evaluation

2.2 Form of the output

- All outputs of the contract will be provided in **English** language
- Outputs provided in electronic format will be in the text format DOC Microsoft Word in MS Windows (CP1250)
- Tabular outputs will be provided in the environment Microsoft Excel (XLS)
- Eventual outputs of exported pictures will be in PDF, JPG or TIF format
- All outputs will be provided also in 2 bound hard-copies.

2.3 Specification of the role of the Contracting Authority

The contracting authority agrees to provide the following:

- Availability of a contact person, on an on-going basis, for the purpose of consultations with the appointed persons on the part of the contractor.
- Participation of appointed members of start of the Contracting Authority at meetings with the contractor.
- After the closure of a each individual call for proposals in Priority axes 1,2 of OP R&DI the contractor will, under a promise of confidentiality, be provided with the project proposals. These proposals will be in English.

2.4 Specification of the role of the contractor

- The contractor will closely collaborate with the Contracting Authority according to the agreed model of mutual communication. The basis for communication will be control days. The contractor will have the duty to participate at a minimum of 3 control days at the seat of the Contracting Authority. The contractor is obliged keep the confidentiality of eventual sensitive information he/she may come into contact with during the work on the contract.

2.5 Documents related to the elaboration of the methodology for evaluation include:

- Operational Programme R&D for Innovation (OP R&DI) ¹
- National Strategic Reference Framework for drawing of financial means from the Structural Funds and Cohesion Fund in the years 2007-2013 – Government Resolution no. 1477/2006²

Implementation Document

- Draft Guide for Applicants (in Czech language), with English part containing Evaluation Criteria.
- Text of Calls in English (currently available is the text of the first call for PA2)
- Successful Tender chosen by contracting authority will receive an overview project proposals submitted in a pre-screening carried out in the spring 2008

3. Qualification fo the tenderer:

3.1 General provision of proving fulfilment of the qualification

The tenderer is obliged in accordance of art. § 50 para ZVZ prove fulfilment of the qualification which is a pre-condition for evaluation of tender offers of small scale.

All documents proving fulfilment of qualification should be provided in original or an officially certified copy. In cases where the Contracting Authority requires a Declaration on Honour, this must be signed by a statutory representative of the

¹ http://www.msmt.cz/uploads/OP_VaVpI.pdf

² http://www.strukturalni-fondy.cz/uploads/documents/NOK/NSRR_final_1.pdf

tenderer; in case of a signature by another person, an original or an officially certified copy of an entitlement given to this person must be provided as a proof of qualification.

Failure to meet these conditions will be qualified as a failure in qualification criteria with the consequence of disqualification.

The tenders registered in the List of certificated suppliers (see the terms set in § 125 and further of ZVZ) may prove the basic qualification and professional qualification requirements got this public tender – in the extent specified of the data contained in the extract and the requirements demanded by the Contracting Authority - by providing an extract from this List (*N.B. operated by administration of relevant State according to residence of tenderer*). This extract must not be older than 3 months from the date to which the fulfilment of this qualification is required.

Tenderes with residence outside of the Czech Republic prove the fulfilment of qualification criteria according to § 51, para 7 of ZVZ (*N.B. in the form which is used in the country of his/her residence*).

3.2 Period for proving the fulfilment of the qualification

The tenderer is obliged to provide all the information and documents proving the fulfilment of qualification in the period specified for submitting this tender as set out in paragraph 14 and 15 of this call for tenders.

3.3 Basic qualification criteria

The tenderer will provide a proof of fulfilment of the basic qualification requirements if he/she provides a proof of the conditions set out in § 53 para of ZVZ.

N.B. Such as that tenderer –

- a) wasn't sentenced for financial criminal offences (or connected with business activity) or he did not act in form of corruption etc.*
- b) is not in bankruptcy proceeding,*
- c) Is not in liquidation*
- d) Fulfils all obligation vis-à-vis the State in areas of taxes, obligatory deductions and payment etc.*

The fulfilment of these qualification requirements is proved on the part of the tenderer by presenting a declaration of honour that he/she fulfils all criteria mentioned in § 62, para 2 of ZVZ.

3.4 Professional qualification requirements

The tenderer will provide a proof of fulfilling the professional qualification requirements by presenting the following:

1. an extract from the business register (or a corresponding national register of business entities in the country of tenderer's residence) if the business entity is registered in such a register, or an extract from a similar registration authority, if the tenderer is registered therein; an original or an authorised/certified copy of this

extract not older than 90 calendar days relating to the date of providing a offer (in accordance of art.14 of this call for tenders) will be provided.

2. a certificate authorising the tenderer to business activity according to special legal regulations in the extent corresponding to the subject of the public tender,
3. full name of the tenderer/organisation, legal status, VAT status, postal address, telephone and fax numbers, e-mail address, contact person in charge of the tender dossier.

3.5 Economic and financial qualification requirements

The tenderer will submit the following:

- financial statements for the last 2 years (balance sheet a profit & loss account), including a statement of the undertaking's overall turnover.
- The Contracting Authority sets the minimum required turnover of at **10 mil CZK** in each of the two last accounting periods.

3.6 Technical qualification requirements

The tenderer will prove the fulfilment of the technical qualification requirements by submitting the following:

- A list of the main services provided over the previous 5 years (by the deadline for submitting the tender for this public tender), detailing their extent/amounts, brief specification (client, subject), dates of implementation. It is required that the list includes services provided in at least 3 different countries with a minimum extent/amount of 1 mil. CZK without VAT while the tenderer has to provide references for projects covering at least 3 out of the 4 below-mentioned categories, i.e.:
 - Elaboration of a methodology for evaluation of R&D projects
 - Evaluation of European, national and/or regional R&D programmes that had a overall R&D budget worth at least 100 mil EUR.
 - Evaluation of the performance of individual research centres
 - Elaboration of a system, methodology and implementation of performance contracts in the field of R&D
- The list of main services provided will include the title of the contract, name of the Contracting Authority, financial amount, in case of evaluation of R&D programmes also the financial amount/extent of the programme that was evaluated, a contact to the contracting authority. The list will be provided in the form of a declaration of honour.
- **Professional CVs of at least 3 members of the expert team** of the tenderer where the tenderer will indicate the leader of the team and members of the team. The precise requirements for the expert team of the tenderer are specified in the chapters 3.6.2-3.6.4. As a minimum, the tenderer will provide the following information about each member of the expert team (on 2 pages A4, a maximum up to 5 pages):
 - Name, surname, title
 - Managing/expert role in the team

- Participation of the team members in the implementation of the project
- Present position (employer etc.)
- Qualification for fulfilling the role in the team
- Language skills
- Experience in the field directly related to the role in the team

Other information important for the fulfilment of the tasks (in case of publication activity only the most important items related to the tasks/activity in the team should be briefly mentioned; maximum of 10 items should be

3.6.1 Proof of fulfilment of the qualification criteria specified in point 3.3. and 3.4. on the part of a tenderer from abroad

- A tenderer from abroad will prove the fulfilment of the qualification criteria in accordance with the legal code applicable in his/her country of legal residence, place of business, or residence, in the extent required by the Contracting Authority. In case the given document is, in accordance with the legal code applicable in the country of legal residence, place of business or place of residence of a foreign tenderer, not being issued, the tenderer is obliged to prove the fulfilment of the given part of the qualification criteria by a declaration of honour. In case the obligation the proof of which is required as a part of the qualification criteria is not compulsory in the country of legal residence, place of business, or residence of the tenderer, the tenderer will make a declaration of honour about this fact
- The documents proving the fulfilment of the qualification criteria may be provided by a tenderer from abroad in the original language only in case the original language is English. In case of other languages the tenderer is obliged to provide these documents in the original language and provide their official translation in English or Czech.

3.6.2 Requirements for the expert team of the tenderer

The tenderer will be fulfilling the tasks according to this specification under his/her own name, independently, and under the control of the Contracting Authority. If the tenderer foresees the necessity of allocating the implementation of certain tasks to subcontractor(s), this will be specified in the tender offer. There will be specified also names (identification of personal data) of subcontractor and volume (expressed in percents) of such subcontracting (for each subcontractor and in total)

3.6.3 Compulsory requirements for the leader of the expert team

The leader of the team must have a proven experience with leading a team that carried out in the past:

- Elaboration of a methodology for evaluation of R&D projects
- Evaluation of the effectiveness of R&D programmes
- Methodology and consulting in implementation of performance contracts for R&D organisations and/or increasing the effectiveness of the operation of R&D institutions

Furthermore, the leader of the team has to possess at least 15 years of relevant professional experience (research and consulting in the field of R&D and innovation policy, and/or management of R&D policy and research programmes) and a demonstrated work experience in relevant fields of activities in at least three different countries. Neither university studies, nor a post-gradual education count as a part of relevant professional experience.

The experience of the leader of an expert team will be demonstrated through the professional CV (see the technical qualification requirements).

Contact with the Contracting Authority:

The leader of the team will be personally in contact the appointed member of staff of the Contracting Authority and will be reporting to him/her about the progress of work.

3.6.4 Compulsory requirements for the members of the expert team

The requirements for the professional qualification of other members of the expert team are the following:

- All the other members of the expert team must possess a demonstrated experience with evaluation of R&D projects and programmes
- The minimum length of a relevant experience for the other members of the expert team is 10 years while neither university studies, nor a post-gradual education count as a part of relevant professional experience.

The experience of the expert team will be demonstrated through the professional CV (see the technical qualification requirements).

4. Tender offer:

The tenderer will describe in the tender offer how the conditions of the tender specification will be met. The tenderer may expand on the description of the fulfilment of the requirements of certain parts and may state why he/she considers it necessary to expand on them.

4.1 The tender offer must contain the following:

- Covering list of offer with identification of personal data of tenderer (such as name, residence, person who acts on behalf of tenderer, identification nr., contact person) and total offer price, including VAT (*N.B. 19 % in the Czech Republic*).
- Declaration signed by an authorised person / person who acts on behalf of tenderer that the tenderer is bound by the entire content of the offer for a period of the tender (see point 13) and that offer is veridical.
- Documents proving the fulfilment of qualification criteria where the original of an offer will contain original documents (or authorised copies thereof) proving the fulfilment of qualification requirements.

- Proposal of a contract signed by an authorised person / person who acts on behalf of tenderer (in line with the tender documentation, especially its business and contractual conditions; in English or in Czech language)
- Detailed description of an offer containing also:
 - Proposed time-table of implementation for a methodology for evaluation of proposals
 - Description of the expert team composition of an expert team, roles of its individual members and their involvement in the implementation of the project and a proposed mode of collaboration with the members of staff of Managing Authority of the OP R&DI. A table showing the involvement of members of the expert team in the implementation of the project will also be presented – type of work (competence for the work, managing role etc.) and time allocation (person-months).
 - Price offered:
 - Price should be mentioned as a **total price for whole subject of a tender in CZK without VAT**, the VAT rate (*N.B. 19 % in the Czech Republic*), and a **total price with VAT**.

This price should be detailed into items by individual parts of the tender so that the mode of calculation of the price can be discerned.

From the calculation it must be clear:

- Price of a methodology for evaluation of proposals according to point 1.1 a)
- price for a man-day for a preliminary analysis of all the submitted project proposals to both of the Priority axes (point 1.1 b). Separately the tendere will specify how many project proposals will be analysed within a manday of such analysis in the required extent and form and to ensure the specified outputs. **It will therefore mean that a price for a preliminary analysis of one project proposal will (project) will be specified.**
- The price will be a final one and will contain all the costs related to the implementation of the tender for all time of its realization.

4.2 Administrative accuracy of the tender offer

- The offer is **delivered** to the Contracting Authority **on time** according to the points 14 and 15 of this tender specification.
- The offer is submitted to the Contracting Authority either in Czech or English (upon own choice) in writing/hard-copy (1 original plus 2 copies) and in an electronic format (CD-ROM,etc).

- The tender offer will be delivered to the address of the Contracting Authority in a closed envelope. The envelope must be clearly marked with a text „**TENDER OFFER - Elaboration of a methodology for evaluation of projects in Priority axis 1 and 2 of the OP Research and Development for Innovation based on performance contracts – DO NOT OPEN**” and a return address of the tenderer.
- Individual sheets of the tender offer will be numbered and the offer will be secured against unauthorised manipulation with individual sheets of the offer..

5. Time schedule of implementation of the tender:

Time schedule of activities:

- Expected beginning of the activity: December 2008
- Methodology for the evaluation of proposals, including a prescribed structure of evaluation forms: till 2 months after the contract signature
- Preliminary analysis of all proposals submitted to priority axis 1 and 2: till 30 days after the closure of the call for proposals. A precise deadline for a call closure is not know yet, but will be specified at the time of contract signature. It is expected that it will take place in the first or the second quarter of 2009 for the first call of PA2 and in the third or the fourth quarter of 2009 for the first call of PA1 and the second call of PA2.
- The period for the implementation of the tender: Expected beginning of the work on this tender is December 2008 and the expected termination is August 31, 2009.

6. Variants of the tender:

The Contracting Authority does not allow variants of the tender offers.

7. Expected value of the public tender (without VAT):

The Contracting Authority stipulates that the maximum permissible value for the tender offer price must be **below 1,600,000,- CZK (without VAT).**

8. Contact persons for additional information concerning this tender specification

The tenders may send their eventual written questions related to this call for tenders so that they are received via electronic mail up to three days before the expiration of the deadline for submitting tender offers to the following contact persons in the Contracting Authority:

| | |
|----------------------|--|
| Mr. David Uhlíř | david.uhlir@msmt.cz |
| Mr. Jan Ďoubal | jan.doubal@msmt.cz |
| Ms. Johana Burgetová | johana.burgetova@msmt.cz |

9. Business conditions

9.1 The tenderer is obliged to propose to the Contracting Authority only one binding a contract proposal for the entire subject of this tender.

9.2 The proposed contract must not in any way limit or restrict the rights or requirements of the Contracting Authority specified in this Call.

9.3 The requirements for the structure of a contract between the Contracting Authority and the tenderer:

- Subject of the contract
- Payment
- Information that the tenderer is not in a conflict of interest.
- Rights and obligations of the Contracting Authority
- Rights and obligations of tenderer (compliance with the approved time plan for preparation and implementation of the activity, provision of outputs, participation at presentation of results from the side of the Contracting Authority and other relevant bodies, an obligation to provide background documents / inputs, an obligation to offer access for the purpose of controls from the side of the Contracting Authority and other competent bodies)
- Liability of contracting parties, sanctions (e.g. penalties in case of unauthorised use of confidential information in business dealings)
- Validity and entry in force of a contract, duration of a contract and its termination
- Total price for all subject of the contract will depend on how many projects will be submitted (and will be subject of preliminary analysis acc. Point 1.1 b). This price will come out from price of man-day and the number of projects allocated for one man-day.

Setting a total number of calls within which the preliminary analysis of project proposals will be carried out is in competence of contracting authority.

- Final provisions

9.4 The tenderer takes into account the fact that the Contracting Authority does not allow variants of the proposed solution.

10. Payment conditions

Payment will be provided in form of one payment (100% of total price) on basis of invoice. The amount should be invoiced after a written approval of the Evaluation Methodology and the Report with the preliminary evaluation of proposals submitted to PA1 and PA2 (see point 2.1) – approval of the fulfilment. If the Contracting Authority does not deliver comments to the tenderer within 20 working days, the report is deemed approved. If the Contracting Authority does not approve, the tenderer is obliged to re-work the deliverables/report(s) and present a new version for an approval within 15 days from the reception of comments. The payment will be

made within 21 working days from the reception of the invoice and the approval of the time of approving the deliverables/report(s)."

11. Licensing conditions

In contract proposal the tenderer will specify that should the results of his activity /deliverables fulfil the criteria of an authorial work in the meaning of the Copyright Act No. 121/2000 Coll., in the valid wording, he/she declares that:

1. he/she shall hereby provide to the Contracting Authority give an authorization for the exercise of the right to use the work in all manners of use known at the time this Contract is concluded, in an unlimited extent with regard to time, the amount of use of the work and the territorial scope,
2. he/she shall declare that the Contracting Authority will have the right to use the work in any manner and in full extent without restrictions,
3. the price for provision of the licence to the rights of use to the work is included in the price of this Contract,
4. he/she gives the Contracting Authority an authorisation for free-of-charge publication of the work, its modified versions, modifications and further processing of the work, its merger with another work, its inclusion without a change or after modification to any collected work, or in connection with another work; all of this in the manner and extent specified in the licence agreement.

This licensing agreement is valid for same time as a validity of author rights to the work.

12. Basic evaluation criterion

The basic criterion will be the **economically most advantageous tender**.

Particular criteria for the selection of the most economically advantageous offer:

| | Weight of the criterion |
|---|--|
| 1. Offer price | 50% |
| 2. Technical quality of the offer | 30% |
| 3. Scientific/professional quality of the offer | 20% |

12.1. Overall evaluation

As economically most advantageous offer will be selected the offer of a tenderer on the basis of the below-described procedure:

Offers will be evaluated on each criteria on the scale of 0-100 points.

The offer that is evaluated in the given criterion as the most advantageous will get 100 points for this criterion. Other offers will gain the points score that corresponds to

degree of fulfilment of the given particular criterion in relation to the most advantageous offer.

For quantifiable (numerical) criteria the following formula will be used:

- for criteria where the most advantageous offer has the lowest value (price, etc.):

100 **multiplied by** the most advantageous offer, i.e. the lowest price (value) **multiplied by** weight expressed in percentage / price (value) of the evaluated offer

- for criteria where the most advantageous offer has the highest value (quality of the team, etc.):

100 **multiplied by** value of the evaluated offer **multiplied by** weight expressed in percentage / most advantageous offer, i.e. the highest value.

For the evaluation of criteria which cannot be numerically quantified a point scale between 0 – 100 will be used. The most advantageous offer will be allocated 100 points and the resulting value will be the number of allocated points of the evaluated offer **multiplied by** weight expressed in percentage.

The offer which gains the highest overall score will be evaluated as the best.

13. Period for which the tenderer is bound by an offer

The tenderer is bound by the entire content of his/her offer for 3 months from the submission of his/her offer.

14. Deadline for submission of offers

The deadline for submitting tender offer is the time in which the tenderer can submit his/her offer. The **deadline** for submission of offer ends on **December 12, 2008 at 12,00 h** of Central European Time.

15. The form and place for submitting tender offers:

15.1 The tenderers can submit their tender offers either in person or by registered mail so that it is delivered before the deadline for submitting tender offers to the Contracting Authority- Each tenderer may only submit one tender offer.

15.2 The tenderers will submit the by registered mail of in person to the Registration Office ("Podatelna") at the following address:

Česká republika - Ministerstvo školství, mládeže a tělovýchovy
Karmelitská 7, 118 12 Praha 1
Czech Republic

16. Right to cancel the call for tenders

The Contracting Authority stipulates its right to cancel the tendering procedure at any time, and without specifying the reason, the latest before the conclusion of a contract with a selected contractor.

The Contracting Authority further stipulates its right to:

- Reject all submitted offers,
- Not to conclude a contract with the selected tenderer.

17. Concluding provisions

The tenderers do not gain any right for reimbursement of the costs incurred in connection preparation of tender offers or with participation in the call for tenders. Neither tender offer, nor their parts will be returned to the tenderers.

The Contracting Authority stipulates its right to:

- Request additional information from the tenderers and to verify the information provided in the offers,
- To negotiate the contractual conditions with a tenderer.

In Prague on November 24 2008



Burgetová
Ing. Johana Burgetová
Director
of Department of Technical Assistance