

QUESTIONS FROM TENDERERS & ANSWERS

Call for tender n° SANCO/2011/B4/003 concerning
"Development and organisation of training courses for non-profit entities in
the EU which provide financial advice to consumers"

LAST UPDATE: 9 August 2011

1. If a tenderer is forming a partnership do they all need to sign Annex IV? (posted on 9 August 2011)

Answer: All partners forming a partnership need to sign Annex IV (Exclusion Criteria).

2. Regarding the invoice "*venue (including lunch and beverages)*": i) Is the rent of the classroom included? ii) Should the tenderer consider lunch and beverages for all the participants during the 2 days course? iii) About the invoice "participants: accommodation", for how many participants should the tenderer pay the accommodation? (posted on 4 August 2011)

Answer: i) Yes the rent of the classroom is included in the "venue", ii) Yes, lunch and beverages should be considered for all participants and the trainer(s) during the two-day course, iii) It is not possible to know for how many participants the tendere will need to pay accommodation, as whether participants need accommodation will depend on which part of the country they come from. It depends on the tenderer to put an estimate in the offer but the tenderer could foresee that the maximum of participants per course (i.e. 20 as indicated in 3.2.5) would need accommodation.

3. In the tender "2011/S 125-206543" at the point "3.2.7. Trainers" it is said "The tenderer shall select at least one trainer for each course". Does the tenderer have to present the 27 CVs of the trainers in the offer or select them after? (posted 29 July)

Answer: The sentence refers to the obligation that the contractor will have at the execution of the contract; i.e. the tenderer should be able to "recruit" at least one trainer to conduct each course. It is up to you to the tenderer to decide whether to include the CVs already in the offer. However not presenting such CVs is not a reason for exclusion.

4. Regarding the technical and professional capacity required (15.3):
 - b). list of principal services provided: Are annual reports sufficient proof of this?
 - b. II) list of works carried out - Does this refer to project already carried out?
 - c). technical equipment to be employed: Would this refer to, e.g. a database already in place to organise trainings? Could you elaborate and/or give an example?
 - d) and f). Could you please elaborate on this and give us examples? (posted 20 July 2011)

Answer: Regarding b) annual reports are considered as proof. bII) It refers to past projects or currently ongoing ones. c) The ToR refers to any equipment that proves that the operator can undertake the tasks, as the database. d) The ToR refers to any method that the operator has to

make sure that the tasks are carried out properly (e.g. regular quality checks) and the facilities refer to the infrastructure of the operator. f) This point is sufficiently clear in the ToR.

5. In terms of the time table as indicated on pages 11-13, 27 trainings have to be given in 21 months, i.e. 1 training per country. The primary target group are 51 entities which need to be covered first. On top of that, 50 other entities shall be trained. Could elaborate on this specific demand? Considering the difference in the amount of entities per country, expected differences in backgrounds and needs of participants, quality control per country given, and no knowledge of the study and the topics to be trained yet, a final and detailed selection procedure is difficult to present. (posted 20 July 2011)

Answer: One training per country needs to take place. A non-exhaustive list of training topics can be found in points 3.2.6 (II) and (II). The final list of training topics to be provided will be decided after the signature of the contract based on the contractor's suggestions, the Commission's approval and the final results of a mapping study, giving more details on the trainings per country. Each training course will be tailored to the specific needs of each Member State. It is up to the tenderer to provide a methodology in order to address the differences in each Member State. The detailed and specific course per Member State is not requested from the tenderer at this stage. The tenderer should provide the methodology for meeting the objectives of the tender and any other supporting element considered appropriate.

Regarding the number of entities to be trained, 50 entities have already been identified by the Commission. A database of potentially more entities will be provided by the Commission to the successful tenderer. Point 3.2.4.II describes the activities the contractor should undertake in order to disseminate the training and identify more entities to be trained, in case the number of participants is smaller than 10 (point 3.2.5)

6. Course design: Do you want us to present a general course design or can we already refer to other courses we have developed Are we allowed to refer to the trainings on financial services we have done so far? (posted 20 July 2011)

Answer: Tenderers should demonstrate the methodology to be used for carrying out the trainings. It is up to the tenderer to decide which elements are necessary for the offer (e.g. presenting a general course design). In case of past trainings conducted by the tender, should tenderers consider them relevant for the current tender they can refer to them and use any elements they deem suitable for the current tender.

7. Evaluation forms: Do you already want an example to be delivered with the tender? (posted 20 July 2011)

Answer: It is up to the tenderer to decide which documentation to provide in order to submit a quality offer.

8. Participants' Pack and Trainer's Pack: Do you want one page with the structure of what would be included in such a pack or do you already want a concrete pack as an example? (posted 20 July 2011)

Answer: It is up to the tenderer to decide which documentation to provide in order to submit a quality offer.

9. Does Annex.V.B need to be made for all EU Member States? (posted on 20 July 2011)

Answer: The tenderer should provide Annex.V.B for all 27 EU Member States. One table needs to be filled in for each country.

10. In the tender “2011/S 125-206543” you say that “The tenderer shall have the capacity to provide the training courses in the official language(s) of the Member State, where the course takes place” (point 3.2.2). Could you tell us in which language the course will be organized in Brussels? Two courses? One in FR and the other in NL? And in Luxembourg? In which language? (posted on 13 July 2011)

Answer: According to the tender specifications, the contractor should be able to provide the training in the official language(s) of the Member State. In the Member States where there is more than one official language, the training should be offered in all languages. It is up to the tenderer to suggest how to treat that and how to organise these courses in the implementation phase. The tenderer shall be able to cover and potentially conduct the trainings in all the official languages of the Member States, as defined by their national law. Whether that will be the case in practice can, unfortunately, not be defined at this moment.

11. Should all training topics listed under 3.2.6 in the tender specifications be covered in each Member State? (posted on 13 July 2011)

Answer: The list of training topics provided under 3.2.6 is indicative and not exhaustive. Not all topics will be covered in all Member States. The exact topics to be addressed in each Member State will be decided by the contractor and the European Commission during the execution of the contract. The results of a preliminary study will provide relevant information regarding the topics to be covered per Member State.

12. Should trainers have all the qualifications mentioned under 3.2.7 in the tender specifications? Is interpretation allowed should the trainer not speak the language of the Member State where the course takes place? (posted on 13 July 2011)

Answer: The trainers have to meet all the criteria laid down in 3.2.7. The trainers should speak the language of the Member State where the training takes place and interpretation will not be allowed.

13. Some of the entities listed in Annex I of the tender specifications are already experts in the field of financial services and provide training themselves. Should they be included in the entities to be trained? (posted on 13 July 2011)

Answer: All entities identified in Annex I should be contacted by the contractor to participate in the training courses. They would decide whether they want to participate or not. The training courses will need to be adjusted to the needs of each Member State.