

# ECMWF Copernicus Procurement

## Invitation to Tender



# Copernicus Climate Change Service Volume II

## User Learning Services

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## 1. Introduction

The Copernicus programme is a user-driven programme which provides six free-of-charge operational services to EU, national, and regional institutions, as well as to the private sector (<http://copernicus.eu/main/services>).

The European Centre for Medium-range Weather Forecast (ECMWF) as the entrusted Entity for two of these operational services, namely the Copernicus Atmospheric Monitoring Service (CAMS) and the Copernicus Climate Change Service (C3S), invites tenders for the development of the Copernicus “User Learning Services” to support existing and new users to make best use of Copernicus data and products. The “User Learning Services” will also contribute to the uptake of the CAMS and C3S data by targeting industry sectors such as energy, insurance and water; policy-makers and local government planners, as well as academic and science communities. Typical audience will be experts working for consultancy companies, research institutes or for policy makers. Moreover, we expect to attract students and non-specialists who may want to use C3S and/or CAMS data.

At the moment of writing, the new Climate Data Store (CDS) and toolbox, which will enable user communities to access and manipulate data made available from the Copernicus services, are being released, thus highlighting the need for training in order to assist in the uptake and ensure best use of the data. Moreover, CAMS has developed a number of training resources (see for example: <http://www.gmes-atmosphere.eu/events/summerschool/>) which would benefit from a technical infrastructure to make training materials easier to access.

The ‘User Learning Services’ shall fulfil three top level requirements:

1. Delivering high quality and customised training activities for the diverse user communities in 33 target countries<sup>1</sup> (Lot 2)
2. Building a portfolio of training resources that can be used as standalone or as part of blended training events. (Lot 2)
3. Building a technical infrastructure which supports learners and trainers (Lot 1)

Such ‘User Learning Services’ will need to understand other European Commission initiatives like Copernicus Relays (<http://copernicus.eu/main/copernicus-relays>) and Copernicus Academy (<http://copernicus.eu/main/copernicus-academy>).

Specific objectives and technical requirements are described in section 2 of this document. General performance requirements are presented in section 3. Information about the tender format and content is in section 4.

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<sup>1</sup> For CAMS and C3S, the 33 target countries are the 28 EU Member States plus Norway which is member of the Copernicus programme, and Iceland, Serbia, Switzerland and Turkey which are ECMWF Member States

## 2. Technical requirements

The ITT contains two Lots, which are then split into Work Packages (WP). Tenderers may bid for one or both Lots.

ECMWF is looking for delivery of a seamless learning experience to their users, with only limited involvement in the management of the service. The successful Tenderer for each Lot will therefore be expected to work in a collaborative and synergetic way that maximises the integration of the two services being sought. The provider of Lot 2 will be tasked with the overall management of the service, however, there will be a requirement for the Lot 1 provider to work in a cooperative and pro-active manner.

### **Lot 1: Provision of the technical infrastructure for the Copernicus User Learning Services**

At the ECMWF there is currently no unique technical infrastructure that supports learners, lecturers and training event organisers. This Lot focuses on the creation and upkeep of a technical infrastructure which will host a suite of tools including a learning experience platform, an event management system and a repository (for example: GitHub/Bitbucket for code, jupyter notebook, document management system for documents, etc.). As part of their bid, Tenderers are asked to identify and propose such tools.

ECMWF also requires a database to collect information on participants, courses etc. for reporting purposes. The successful Tenderer shall also provide the hosting of the infrastructure and shall ensure a design that allows integration to the Copernicus website to provide a seamless experience to users and to support branding.

#### **WP1: Develop, implement and operate the technical infrastructure:**

The successful Tenderer shall develop, implement, operate (including software updates and installation of plugins as required and in coordination with the successful Tenderer of Lot 2) and maintain the overall technical infrastructure as agreed with ECMWF. This will include the creation of a 'landing page', support and update of daily operations of the service (24/7), management of software licenses where needed, provision of training for the use of the suite of tools (the audience of the training will be: trainers, learners and event organisers) and the creation and maintenance of all necessary documentation throughout the length of the contact.

Moreover, SLAs (such as: system up time, weekend call out, response to all queries related to the tools within 2 days, response to queries related to the access of tools within 1 day) and KPIs shall be proposed as part of the Tenderers bid, and subsequently agreed with ECMWF. It is expected that users will access the technical infrastructure via the current C3S website to ensure a seamless user experience and support the branding.

*This Work Package will cover the length of the contract*

Key deliverables:

- Development, implementation, operation and maintenance of the technical infrastructure which shall integrate with and have the look and feel of the current Copernicus web infrastructure to

- ensure a seamless user's experience.
- Provision of the service in accordance with agreed SLAs and KPIs
- Production of quarterly and annual operational reports, including KPIs
- Production and update of any documentation needed to operate and maintain the technical infrastructure
- Work cooperatively and in close collaboration with the successful Tenderer for Lot 2 in order to deliver a full User Learning Service.
- Coordination of software updates (dates, frequency, backward compatibility)
- Ensuring that the technical platform meets the evolving requirements of learners and trainers by surveying the market for new plugins and submit them for implementation (or development) in the platform as required (in collaboration with the Lot 2 provider)

### **WPO: Management and coordination**

WPO covers the management of Lot 1. The successful Tenderer of Lot 1 shall provide the management of:

- Software updates to ensure that the platform is continuously improving and benefits from the latest technical developments and guarantees backward compatibility
- Report on the SLAs and KPIs to ECMWF
- Collaborate with the successful Tenderer of Lot 2 to ensure the full availability and functionality of the technical infrastructure.

As part of the general contract management description, the Tenderer shall include the following elements in line with the reporting and planning requirements as laid down in the Terms and Conditions of the Framework Agreement (this is not an exhaustive list):

- Quarterly, annual and final reports shall be provided in accordance with the Framework Agreement Article 2.3.
- An implementation plan for the year N+1 shall be provided in February of the year N for ECMWF approval.
- A list of sub-contractors and details of their contribution, key personnel, legal names and addresses shall be provided. The tenderer shall describe how the Framework Agreement, in particular Clause 2.9, has been communicated down to all their sub-contractors.

The table below provides the template to be used by the successful Tenderer to describe the complete list of deliverables, milestones and schedules for WPO. All milestones and deliverables shall be numbered as indicated. All document deliverables shall be periodically updated and versioned as described in the table.

Tenderers shall provide preliminary versions of the completed tables as part of their bid.

Deliverables for this work package shall include the following reports:

<b>WPO Contractual Obligations Template</b>				
<i>#</i>	<i>Responsible</i>	<i>Nature</i>	<i>Title</i>	<i>Due</i>
D0.y.z-YYYYQQ	Tenderer	Report	Quarterly Implementation Report QQ YYYY <i>QQ YYYY being the previous quarter</i>	Quarterly on 20/01, 20/04, 20/07 and 20/10
D0.y.z-YYYY	Tenderer	Report	Annual Implementation Report YYYY <i>YYYY being the Year n-1</i>	Annually on 28/02
D0.y.z	Tenderer	Report	Final report	60 days after end of contract
D0.y.z-YYYY	Tenderer	Other	Preliminary financial information YYYY <i>YYYY being the Year n-1</i>	Annually on 15/01
D0.y.z-YYYY	Tenderer	Report	Draft Implementation plan YYYY <i>YYYY being the Year n+1</i>	Annually on 28/02
D0.y.z-YYYY	Tenderer	Report	Finalised Implementation plan YYYY <i>YYYY being the Year n+1</i>	Annually on 31/10
D0.y.z-YYYY	Tenderer	Other	Copy of prime contractor's general financial statements and audit report YYYY <i>YYYY being the Year n-1</i>	Annually
D0.y.z-YYYY	Tenderer	Other	Letter from auditor specific to contract YYYY <i>YYYY being the Year n-1</i>	Annually

## **Lot 2: Building training resources, delivering training activities and assessing their effectiveness**

The successful Tenderer shall develop and deliver training for a wide range of audience types in target countries, by identifying knowledge gaps and training requirements of the audience groups, and developing a training strategy to address such needs.

This Lot also includes the total management of training events including the arrangement of venues and facilities, accommodation and refreshments, and travel costs of the attendees where appropriate.

## **WP1: Define users' needs**

In order to deliver training that meets stakeholders' needs, it is essential to understand their needs. Therefore, WP1 shall gather training requirements from users within the target countries focusing on sectors who would be interested in Copernicus outputs. As part of their bid, Tenderers shall propose a plan on how to gather such requirements highlighting modalities in which information is collected (for example Users workshops, surveys, interviews, ad hoc visits to the largest stakeholders) and priority audiences (indication of how priorities have been assigned needs to be included). The proposed plan will then be discussed and agreed with ECMWF, and the successful Tenderer shall then implement the agreed plan, and report back the results in the form of a report.

*This WP shall be completed within T0 + 3 months*

Key deliverables:

- Implementation of agreed plan for the gathering of training requirements
- Report detailing training requirements

## **WP2: Build training resources**

This WP is aimed at building training resources (for example online training modules, games, quizzes, etc.) to be used as part of blended courses, online self-paced training activities and other training events. It will include the provision of a detailed plan on how such resources will be developed (type of media used, for example: videos, games, jupyter notebooks, etc. needs to be included in the plan), a description of the pedagogical approaches for each of the topics as well as the delivery methodology (ie video, online module etc) best suited for the topic and audience. The Tenderer shall also provide of a list of topics to be included in the development of training resources based on the outcome of WP1. The resources shall be written in English, with around an hour worth of content each.

The set of topics shall cover all aspects related to the C3S, including, but not limited to:

- Climate Data Store (<https://climate.copernicus.eu/climate-data-store>)
- Data discovery
- Climate Data Store Toolbox
- Essential Climate Variables
- Seasonal forecasting
- Reanalysis
- Climate projections
- Sectoral Information System (including case studies)
- Evaluation and Quality Control function

The Tenderer shall maintain and update these training resources as needed during the full length of the contract.

*At least 15 training resources will be developed within T0 + 6 months, and at least 25 within T0 + 12 months. The remaining 5 shall be developed during the first half of the second year.*

Key deliverables:

- Provision of a training resources plan
- The development of 30 training resources within the specified timescales

**WP3: Create a training programme, advertise and deliver training events and assess their effectiveness**

This WP includes 3 tasks:

- **Task 1:** Defining appropriate learning paths which address stakeholders' needs is essential to the success of learning services. Such pathways contain groups of related content and resources together with a blend of different modalities of delivery (courses, videos, practical activities, coding, gaming, etc.) which address the different ways people learn. The successful Tenderer shall therefore create courses based on sound learning paths. This will require knowledge of the audience, well defined learning objectives (WP1), appropriate training resources (WP2) and skilled trainers/mentors. The training initiatives shall be customised to the users' needs and shall span different level of knowledge.

On the basis of the outcomes of WP1 and WP2, the successful Tenderer shall create an annual training programme, based on sound learning paths, constituted of 10 training events per year to be delivered under the Copernicus 'User Learning Services'. The yearly training programme shall include a price estimate for each of the training events. Such training programme shall be reviewed yearly.

In addition, the successful Tenderer shall also investigate the implementation of the European Credit Transfer and Accumulation System (ECTS) which allows credit transfer among European training institutions, and provide recommendations to ECMWF regarding its appropriateness and how it could be utilised.

*This task will be completed within T0 + 4 months*

- **Task 2:** Based on ECMWF's requests of Service Contracts, the Tenderer shall create, organise, advertise and deliver the training programme as defined in the request of Service Contract and the outcome of Task 1 of WP3. The Tenderer shall provide ECMWF with price details and a list of subcontractors involved using the templates as provided by ECMWF. At least 30 training events will be run in the target countries as either local (open to a specific Member State), or regional (training initiatives open to more than one Member State) events together with fully online synchronous or asynchronous training events. Training events held in target countries should be delivered in the language most appropriate to that country, which will normally be the local language. The successful Tenderer may therefore need to consider collaboration with regional subcontractors for training needs in the local language.

*This task will start at T0 + 5 months and run throughout the length of the contract*

- **Task 3:** The successful Tenderer shall implement a feedback loop whereby user comments can be taken on board to improve subsequent editions of courses/training events, as well as offer a way to assess the effectiveness of the User Learning Services. As a result of the feedback, the successful Tenderer shall make revisions and adjustments to the training materials and strategy,

in agreement with ECMWF to ensure that the training programme continues to address the users' needs. Moreover, this feedback collection process must be as user friendly as possible and include an escalation procedure for complaints.

*This task is expected to have the same timelines as Task 2 of WP3*

Key deliverables:

- Create a yearly training programme that meets users' needs
- Provide recommendations on the implementation of the ECTS to ECMWF with the view of implementing it if agreed by ECMWF
- Successfully organise and deliver the yearly training programme as agreed with ECMWF.
- Report quarterly to ECMWF about user feedback, effectiveness of the learning services and any improvement actions undertaken/planned.

### **WP0: Management and Coordination**

WP0 covers the overall management and coordination of the contract. The successful Tenderer of Lot 2 shall provide the overall management of the whole service, including oversight of, and coordination with, the provider of Lot 1. This shall include:

- Ensuring that the service meets the evolving requirements of learners and trainers by regular assessment of the user needs and new training methods, whilst maximising synergies with improvements in the technical infrastructure
- Ensuring that the branding is consistent throughout the User Learning Services (technical platform, training resources, organisation and delivery of training)
- Ensuring that training events run smoothly (access to technical platform for trainers, trainees, organisers)
- Coordination of software updates of the technical infrastructure (dates, frequency, backward compatibility)
- Monitoring and management of the provider of the Technical Infrastructure, including adherence to the operational SLAs / KPIs

It shall include an organigram of roles and responsibilities of key-persons involved in the contract and a Gantt chart with a detailed planning for the full duration of the Framework Agreement of 36 months.

The Tenderer is expected to clearly demonstrate how it intends to manage sub-contractors' activities and how it will deal with eventual conflicts and underperformance. The Tenderer may allocate new sub-contractors to specific tasks throughout the contract and should put in place an auditable selection process. *A report on the selection process should be proposed to ECMWF for approval as a deliverable by T0+1month.*

ECMWF should be informed on any changes in the list of subcontractors throughout the full duration of the contract.

The Tenderer shall put in place a payment and financial management tool to manage contract expenses, including fees and travel expenses for external experts and specialists (eg. when they need to attend local or regional training sessions) and travel expenses for the learners. A methodology to assess, accept and pay for travel costs should be developed and proposed to ECMWF for approval as a deliverable by T0+1 month, an outline of which should be included in the Tenderer's proposal. Following principles may be taken into account (this is not an exhaustive list):

- travel costs for external experts will be reimbursed
- travel costs for learners attending local and regional training events can be reimbursed if the learner's employment venue is based at least 100 km from the training venue;
- in cases where external experts and learners need to stay overnight, per-diem rates (for example based on: [https://ec.europa.eu/europeaid/sites/devco/files/perdiems-2017-03-17\\_en.pdf](https://ec.europa.eu/europeaid/sites/devco/files/perdiems-2017-03-17_en.pdf)) shall be applied as agreed in advance with ECMWF in the payment methodology report;
- only economy rates are accepted for train and flights;
- selected and accepted travel modi should be those with the least carbon footprint and ambient air quality impacts.

The methodology may be revised on an annual basis upon acceptance by ECMWF. Per-diem rates should however be fixed for the full duration of the Framework Agreement.

Tenderers shall propose an outline of a quality assurance plan, covering both content as well as service delivery. *This plan needs to be elaborated in detail as a deliverable by T0+1month.* Furthermore, the Tenderer shall propose ECMWF a set of Key Performance Indicators (KPIs) suitable for monitoring various aspects of the service performance and propose a detailed risk and mitigation plan. Both KPIs as well as the risk and mitigation plan shall be updated during the course of the contract on a quarterly basis.

Monthly teleconferences with ECMWF and a proposal for involvement of ECMWF in major contract reviews shall be provided as part of the management plan.

As part of the general contract management description the Tenderer shall include the following elements in line with the reporting and planning requirements as laid down in the Terms and Conditions of the Framework Agreement (this is not an exhaustive list):

- Quarterly, annual and final reports shall be provided in accordance with the Framework Agreement Article 2.3.
- An implementation plan for the year N+1 shall be provided in February of the year N for ECMWF approval.
- A list of sub-contractors and details of their contribution, key personnel, legal names and addresses shall be provided. The tenderer shall describe how the Framework Agreement, in particular Clause 2.9, has been communicated down to all their sub-contractors.

The table below provides the template to be used by the successful Tenderer to describe the complete list of deliverables, milestones and schedules for WPO. All milestones and deliverables shall be numbered as indicated. All document deliverables shall be periodically updated and versioned as described in the table.

Tenderers shall provide preliminary versions of the completed tables as part of their bid.

Deliverables for this work package shall include the following reports:

<b>WPO Contractual Obligations Template</b>				
<b>#</b>	<b>Responsible</b>	<b>Nature</b>	<b>Title</b>	<b>Due</b>
D0.y.z-YYYYQQ	Tenderer	Report	Quarterly Implementation Report QQ YYYY <i>QQ YYYY being the previous quarter</i>	Quarterly on 20/01, 20/04, 20/07 and 20/10
D0.y.z-YYYY	Tenderer	Report	Annual Implementation Report YYYY <i>YYYY being the Year n-1</i>	Annually on 28/02
D0.y.z	Tenderer	Report	Final report	60 days after end of contract
D0.y.z-YYYY	Tenderer	Other	Preliminary financial information YYYY <i>YYYY being the Year n-1</i>	Annually on 15/01
D0.y.z-YYYY	Tenderer	Report	Draft Implementation plan YYYY <i>YYYY being the Year n+1</i>	Annually on 28/02
D0.y.z-YYYY	Tenderer	Report	Finalised Implementation plan YYYY <i>YYYY being the Year n+1</i>	Annually on 31/10
D0.y.z-YYYY	Tenderer	Other	Copy of prime contractor's general financial statements and audit report YYYY <i>YYYY being the Year n-1</i>	Annually
D0.y.z-YYYY	Tenderer	Other	Letter from auditor specific to contract YYYY <i>YYYY being the Year n-1</i>	Annually

Key deliverables:

- Detailed plans on how the coordination function will be managed including roles and responsibilities
- Seamless delivery of the User Learning Service

*This task is expected to run from T0 to the end of the contract*

### **3. General requirements**

#### **3.1. Coordination between Lot 1 and Lot 2**

The successful Tenderer of Lot 2 shall provide the overall coordination of the whole service, including management of, and coordination with, the successful Tenderer of Lot 1. The coordination provided by the successful Tenderer of Lot 2 shall include:

- Coordination of software updates (dates, frequency, backward compatibility)
- Ensuring that the technical platform meets the evolving requirements of learners and trainers by surveying the market for new plugins and submit them for implementation (or development) in the platform as required
- Ensuring that the branding is consistent throughout the User Learning Services (technical platform, training resources, organisation and delivery of training)
- Ensuring that training events run smoothly (access to technical platform for trainers, trainees, organisers)

Moreover, the successful Tenderer of Lot 2 shall monitor that the Lot 1 provider is meeting the operational requirements and that SLAs and KPIs are met.

Tenderers who are able to cover both Lot 2 and Lot 1 potentially by sub-contracting, are welcomed.

### 3.2. Implementation of schedule

Tenderers for each Lot should provide a detailed time plan and schedule as part of the tender response. The proposed time plan and schedule shall address the main tasks, inputs, outputs, intermediate review steps, milestones, deliverables and dates. Regular progress meetings will be held with ECMWF during the contract to assess project status, risks and actions.

Activities shall be performed in the context of an agreement of maximum 36 months with individual Service Contracts.

For Lot 1, annual Service Contracts will be issued by ECMWF.

For Lot 2, multiple Service Contracts will be issued by ECMWF:

- An initial Service Contract running from T0 to T0+4months will be issued covering WPO, WP1, WP2 and WP3 Task 1. This Service Contract is planned to be renewed on an annual basis upon a review of the service delivery. The kick-off (KO) of the first service contract is scheduled to commence in the first quarter of 2018.
- Short term Service Contracts will be issued covering WP3 Task 2 and/or WP3 Task 3. The content and duration of these Service Contracts will be based on the yearly training programme as defined in WP3 Task 1 but ECMWF may also launch occasional Service Contracts on an ad-hoc basis. Some Service Contracts may be launched in parallel. The process of requests for Service Contracts are specified in the Terms and Conditions (cf. Volume V Framework Agreement).

### 3.3. Meetings

As well as the progress meetings mentioned above, the successful Tenderer for Lot 2 is expected to attend the C3S and CAMS General Assemblies (one assembly each for C3S and CAMS during the life of the contract) to ensure the continuous development of the User Learning Service in line with the stakeholders needs. The cost of attending these meetings shall be covered by the successful Tenderer for each Lot and

shall be included in the tender price. The Tenderer is expected to attend monthly video conference meetings and review meetings agreed at contract signature.

### **3.4. Deliverables**

Expected top level deliverables are outlined in section 2. These can be in the form of documents or reports, training resources, training activities, and user support. Some additional deliverables may be agreed with the successful tenderer during the negotiation stage.

The IPR of the training content produced as part of the contract will rest with the European Commission.

For both Lots tenderers are advised to take into account the relevant terms and conditions on IPR as laid down in “Clause 3: Intellectual Property Rights” of Volume V Framework Agreement.

### **3.5. Documents and reports**

All project reports, learning material and other documents shall be produced in English. The quality of these shall be equivalent to the standard of peer-reviewed publications and practice. Unless otherwise agreed by ECMWF, documents and reports shall be made available to ECMWF in electronic format (PDF/Microsoft Word/Microsoft Excel or compatible).

### **3.6. User support**

ECMWF has established a centralised Service Desk to provide multi-tiered technical support to all users of C3S and CAMS data, products, tools and services. The C3S and CAMS Service Desk is used for ticketing user requests and distributing these requests to specialists as needed. ECMWF provides basic support in the form of self-help facilities (FAQs, knowledge bases, tutorials etc.) as well as dedicated staff giving individualised support on technical queries related to the CDS, data formats, data access etc. In addition, ECMWF staff will provide specialised scientific support to address questions related to its industrial contributions to C3S and CAMS, e.g. in the areas of global reanalysis and seasonal forecasting.

All C3S and CAMS contractors are expected to contribute to the delivery of multi-tiered technical support for the data and/or services they provide. Such specialised user support shall take the form of direct response to individual user queries via the C3S and CAMS Service Desk facility, as well as contributions to FAQs, user guides and knowledge bases.

### **3.7. Key Performance Indicators**

The service shall be delivered in iterative cycles on an annual basis. At the end of each year, a service readiness review shall take place that will include assessment of a set of Key Performance Indicators (KPIs). The KPIs shall be designed to quantify different aspects of quality of service against the requirements described in this document.

As part of their bid, Tenderers shall specify a proposed set of KPIs appropriate for the service, e.g. relating quality of training events, uptake of training (events and resources), user support, user satisfaction

(including learners and lecturers experience with the technical infrastructure), etc. These KPIs may be refined, in agreement with ECMWF, during the lifetime of the contract.

#### 4. Tender format and content

General guidelines for the tender are described in Volume IIIB. Specific requirements to prepare the proposal for this particular tender are described in the next subsections.

The Tenderer shall provide an executive summary of the proposal, describing the objectives, team and service level.

For Lot 1, the proposal shall include details of the technical infrastructure for the “User Learning Services’ (ie suite of tools, licences, etc) as well as proposed KPIs and SLAs, and describe how the proposed infrastructure meets the needs.

For Lot 2, the proposal shall contain a description of the pedagogical approaches for each topic as well as the delivery methodology (ie video, online module etc) best suited to the topic and audience. It should also contain a communication strategy (advertising material, advertising channels) and a strategy for the delivery of training programme, including choosing appropriate venues, finding experts, handling expert’s fees and all costs relating to training events.

Further, the response on Management shall contain details on the level of oversight and coordination to be provided and the roles and responsibilities for the Tenderer(s) of Lot 1 and Lot 2, as well as interfaces to ECMWF as customer.

##### 4.1. Page limits

As a guideline, it is expected that individual sections of the Tenderer’s response do not exceed the page limits listed below. These are advisory limits and should be followed wherever possible, to avoid excessive or wordy responses.

<i>Section</i>	<i>Page limit</i>
<i>Track Record</i>	2 (for general) and 2 (per entity)
<i>Quality of Resources to be Deployed</i>	2 (excluding Table 1 in Volume IIIB and CVs with a maximum length of 2 pages each)
<i>Management and Implementation</i>	10 (excluding Table 3, Table 5 and Table 6 in Volume IIIB) + 2 per each work package description (Table 4 in Volume IIIB)
<i>Pricing Table</i>	No limitation

#### **4.2. Specific additional instructions for the Tenderer's response**

The following is a guide to the minimum content expected to be included in each section, additional to the content described in the general guidelines of Volume IIIB. This is not an exhaustive description and additional information may be necessary depending on the Tenderer's response.

#### **4.3. Track Record**

The tenderer shall demonstrate for itself and for any proposed subcontractors that they have experience with relevant projects in the public or private sector at national or international level, including solid experience in organising, planning and managing training initiatives in multiple European countries. ECMWF encourages innovation in the field of learning services, therefore the Tenderer shall provide evidence of successful training initiatives including audiences and description of innovative solutions. ECMWF may ask for evidence of performance in the form of certificates issued or countersigned by the competent authority.

#### **4.4. Quality of Resources to be Deployed**

The Tenderer shall propose a team with the skills required for providing operational services that meet the technical requirements set out in section 2. The team shall include a Service Manager with at least 5 years of experience in management of large-scale projects. The Tenderers shall describe the experience of the Service Manager and the technical project team in performing activities related to the various aspects of this tender.

#### **4.5. Technical Solution Proposed**

The Tenderers shall give a short background to the proposed solution to demonstrate understanding of that solution and of the requirements as specified in section 2. This section shall also include information on any subcontractors that are used as part of the solution, and a statement of compliance for each requirement formulated throughout this document, describing how the proposed solution maps to the requirements.

#### **4.6. Management and Implementation**

For each Lot, the Tenderers shall provide a detailed implementation plan of proposed activities for the duration of the framework agreement. For each workpackage, the template as proposed in Volume IIIB should be used and the workpackage numbering as presented in Section 2 should be followed. Deliverables should be consistent with the technical requirements specified in section 2, additional deliverables may be added if required. The number of milestones is not restricted, but they should be designed as markers of demonstrable progress in service development and/or quality of service delivery.

Elements as described in the chapters on WPO Management and Coordination for Lot 1 and Lot 2 shall be taken into account in the response to this section.

Tenderers are free to make proposals that they consider necessary for the effective management and implementation of the contract.

Tenderers shall also provide a list of sub-contractors (if applicable) describing their contribution and key personnel, legal names and addresses.

#### 4.7. Pricing

Tenderers are expected to determine their price using the MS Excel files provided in as included in Volume IIIA:

- COP\_010\_Volume IIIA\_Pricing tables\_Lot 1
- COP\_010\_Volume IIIA\_Pricing tables\_Lot 2

Monthly Fee rates shall be determined based on salary costs, profit rates and indirect costs for the different levels of experts involved:

- L1\_Manager
- L2\_Senior expert
- L3\_Expert
- L4\_Support staff

Actual titles and roles may alter and should be specified for Lot 1 and Lot 2 but the breakdown of the fees categories should be followed throughout the Framework Agreement.

##### 4.7.1. Pricing Table for Lot 1

For Lot 1, monthly fee rates should be proposed for the different roles of experts involved.

Based on the fees, eventual travel costs and other direct costs such as software licences, a total price should be provided which will be used for the evaluation of the tender and the agreement of the maximum price of the Framework Agreement.

Tenderers are expected to fill out the dedicated sheet in the MS Excel Pricing Tables as included in Volume IIIA.

##### 4.7.2. Pricing Table for Lot 2

For Lot 2, a price should be given for the scenario as described below. This price is used for evaluation purposes of the tender only. Tenderers are expected to fill out the dedicated sheet in the MS Excel Pricing Tables as included in Volume IIIA.

Price determination scenario for Lot 2:

*Price determination scenario, assuming an implementation period of 12 months and the 2018 fee rates of the Tenderer's and it's subcontractor's experts:*

1. *Contract management and coordination, development of training programmes*
2. *User needs collection and assessment for all EU Member States*
3. *Development of 25 training resources assuming all training material needs to be developed from scratch*

4. *Development, implementation and evaluation of 8 local training courses (in English) based on a 3-days face-to-face programme with a target audience of 30 participants in each country and tutoring of 5 external experts:*
  - a. *Czech Republic*
  - b. *France*
  - c. *Germany*
  - d. *Greece*
  - e. *Italy*
  - f. *The Netherlands*
  - g. *Spain*
  - h. *Sweden*
5. *Development, implementation and evaluation of a 2-days hackathon (in English) organised in the U.K. with 20 participants;*
6. *Development, implementation and evaluation of 1 regional network and training event (in English) in the Baltic States based on a 3-days face-to-face programme with a target audience of 50 participants and tutoring of 2 external experts and key-note speeches of 3 local specialists;*
7. *Development, implementation and evaluation of e-learning material and a video on the use of the CDS Toolbox functionalities.*

*NOTE: For the events as described under 4, 5 and 6, the Tenderer should account for costs for travel, logistics, training material and assume that travel costs and per-diems for all external experts and 70% of the participants need to be covered.*

#### **4.7.3. Pricing Table for Service Contracts**

For each new Service Contract launched within the Framework Agreements of Lot 1 or Lot 2, a price will be determined for the specific activities covered within that Service Contract.

The price will be based on monthly fee rates fixed at the signature of the Framework Agreement, eventual travel costs and other direct costs such as software licences, event logistics, training material, etc.

For training events and sessions in Lot 2, the price estimates as provided in the yearly training programmes will be used as reference figures.