



ANNEX III: ORGANISATION & METHODOLOGY

To be completed by the tenderer

Please provide the following information:

1. Rationale

- Any comments you have on the terms of reference for the successful execution of activities, in particular regarding the objectives/results (outputs, outcomes, impact), thus demonstrating the degree of understanding of the contract. Your opinion on the key issues related to the achievement of the contract objectives and expected results.
- An explanation of the risks and assumptions affecting the execution of the contract.

2. Strategy

- An outline of the approach proposed for contract implementation.
- A list of the proposed tasks you consider necessary to achieve the contract objectives.
- Inputs and outputs.

3. Support facilities, subcontracting and capacity providing entities

- A description of the support facilities, including back-stopping, that the contractor will provide to the team of experts during execution of the contract. The support facilities will be assessed in the evaluation and should be carefully explained in the organisation and methodology, including the list of staff, units, capacity of permanent staff regularly intervening as experts on similar projects, provision of expertise in the region/country of origin as well as partner countries, organisational structure, etc. which are supposed to ensure that function, as well as the available quality control systems and the excellent knowledge capitalisation methods and tools, within the respective members of the consortium.
- A description of any subcontracting arrangements– including sub-contracting only aiming at making available key and non-key experts - and sub-contracting with capacity providers (if such were identified during the shortlisting stage) with a clear indication of the tasks that will be entrusted to such subcontractors. All subcontractors and capacity providers shall be eligible and should not fall in any exclusion situation as stated in section 4 of the tender submission form.

4. Involvement of all members of the consortium and of capacity providing entities

- If a tender is submitted by a consortium, a description of the input from each member of the consortium and the distribution and interaction of tasks and responsibilities between them. Furthermore, the involvement of all members of the consortium will be considered added value in the tender evaluation.
- The involvement of Small and medium-sized enterprises (SME's), or economic operators registered in the partner country where the contract will be implemented, will be considered an added value in the tender evaluation. SME's employ fewer than 250 persons and have an annual turnover not



exceeding EUR 50 million, and/or an annual balance sheet total not exceeding EUR 43 million.

- If the tenderer relied on the capacity of other entities to fulfil the technical and professional criteria, a description on the involvement of those entities for performing the services for which their technical and professional capacities are required must be provided. Evidence of the involvement of the capacity providing entities should be demonstrated through a written commitment made by the capacity providing entities.
- If the tenderer relied on the capacity of other entities to fulfil the economic and financial criteria, a description on the involvement of those entities establishing their joint liability for the performance of the contract must be provided. Evidence of the involvement of the capacity providing entities should be demonstrated through a written commitment made by the capacity providing entities.

5. Timetable of work

- The timing, sequence and duration of the proposed tasks, taking into account travel time.
- The identification and timing of major milestones in executing the contract, including an indication of how the achievement of these would be reflected in any reports, particularly those stipulated in the terms of reference.
- The methodologies contained in the offer should include a work plan indicating the envisaged resources to be mobilised.

Guidance notes on expert inputs:

The tenderer is expected to take into account the implementation period of the contract and propose the number of days which will be needed for experts to accomplish the tasks described in the terms of reference.

Implementation of the contract (and therefore payment) is based solely on the working days. The contractor will only be paid for days actually worked on the basis of the daily fee rate contained in the budget breakdown (Annex V). Tenderers must annex the 'Estimated number of working days' worksheet contained in the spreadsheet for Annex V to the organisation and methodology to demonstrate the correspondence between the proposed methodology and the expert time inputs. Please note that the budget breakdown should not be attached to the organisation and methodology as no financial offer should be disclosed in the technical offer.

During the technical evaluation, assessment will be made if the number of working days estimated for each month for each type of expert proposed in the organisation and methodology are sufficient for the requirements of the terms of reference to be achieved. This is judged on the basis of the profiles identified in the terms of reference and the organisation and methodology.

The tenderer is expected to include the holiday provision for the experts. The annual leave entitlement of the experts employed by the contractor is determined by their employment contract with the contractor and not by the service contract between the contracting authority and the contractor. However, the contracting authority can decide when experts take their annual leave since this is subject to approval by the project manager, who will assess any such request according to the needs of the project while the contract is in progress. For obvious reasons, a day of annual leave is not considered to be a working day. Please see the general conditions, Articles 21 and 22.

The fee rates for all experts must include the remuneration paid to the experts, all the administrative costs of employing the relevant experts, such as equipment, relocation and repatriation expenses



[including flights to and from the place of performance upon mobilisation and demobilisation as well as leave], accommodation, expatriation allowances, leave, medical insurance and any other employment benefits given to the experts by the contractor. It shall also include any security arrangement except when this is exceptionally included under the incidental expenditure. Furthermore the fees shall also include the margin, overheads, profit and support facilities.

A fee-based/technical assistance contract is, by definition, one in which the actual days worked each month for each category of experts may differ from the number of working days estimated for each month in the work plan in Annex V. The actual input required for the tasks specified in the terms of reference and organisation and methodology will only be known once the contract starts. The project manager will use the work plan when monitoring the actual number of working days submitted in each invoice to check that the contract is progressing within budget. The contractor may update the estimate during implementation of the project in accordance with article 20 of the general conditions.