EUROPEAN CENTRE FOR DISEASE PREVENTION AND CONTROL

Public Health Functions (PHF)

European Centre for Disease Prevention and Control

Call for tenders ECDC/2024/OP/0017 – PHF/240340 Services to support training activities in infectious diseases prevention and control

Open procedure

TENDER SPECIFICATIONS

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1. SCOPE AND DESCRIPTION OF THE PROCUREMENT

1.1. Contracting authority: who is the buyer?

This call for tenders is launched and managed by the European Centre for Disease Prevention and Control, referred to as the contracting authority for the purposes of this call for tenders.

1.2. Subject: what is this call for tenders about?

The subject of this call for tenders is to support training activities in infectious diseases prevention and control. This entails design and development of online, in-person, instructor-led and self-paced training activities, including analysis of learners' needs, design of the curriculum, development of the training materials, delivery of a training event by providing facilitators, venue, logistics, evaluation and impact of training activities.

1.3. Lots: is this call for tenders divided into lots?

This call for tenders is not divided into lots.

1.4. Description: what do we want to buy through this call for tenders?

The purchases that are the subject of this call for tenders, including any minimum requirements, are described in detail below.

Variants (alternatives to the model solution described in the tender specifications) are not allowed. The contracting authority will disregard any variants described in a tender.

1.4.1. Background and objectives

Based on previous learnings, as well as the first year of the COVID-19 pandemic, the European Commission indicated the need to better protect the health of EU citizens, equip the EU and its Member States to better prevent and address future health crises, and improve the resilience of the health systems, which would be done through the European Health Union. Four legislative acts for the European Health Union were proposed, one of which was the amended ECDC Founding Regulation. To ensure implementation of the changes entailed by the amended Founding Regulation, ECDC Strategy 2021-2027 was amended accordingly. One of the strategic objectives states that the new skills and competencies for the public health workforce remain one of the core tasks of ECDC. The reinforced mandate of ECDC requires new competencies such as bioinformatics, new digital skills, prevention, and systems thinking to be developed and training in public health to be expanded to new audiences. This is done through existing ECDC Fellowship programme (EPIET/EUPHEM) and continuous professional development programs coordinated by ECDC. Collaboration with national and international training partners is crucial to ensure coherence of programs and synergies in approaches.
The overall **objectives** of this call for tender are:

1. Strengthen the knowledge, skills and competencies of the public health workforce in the Member states within the remit of ECDC mandate.

2. Implement continuous professional development training activities under different formats in function of the identified learning needs. These include but are not limited to: online micro-learning pills; online self-paced e-learning courses; online webinars; online instructor-led courses; in-person instructor-led courses; in-person instructor-led workshops.

1.4.2. Detailed characteristics of the purchase

The requested services are organised into 6 work packages for the development and delivery of training assets with complementary sets of transversal tasks and deliverables linked to the implementation of the specific contracts, such as Meetings and Reports and logistic organisation of training activities.

The objectives, specific topics, and target audience of each training asset will be described in a specific contract.

Overall, the target audience will essentially be composed of national, regional and local public health professionals or health professionals at different stages of their career working in infectious disease prevention and control in EU/EEA. All trainings will be organised in EU/EEA countries. Professionals from other countries may also benefit from the learning initiatives.

Work package 1 – Assessment of learning needs

ECDC collects from various sources and through different channels learning needs for capacity building in Public Health (needs may be important, urgent or both). To best serve our stakeholders, ECDC aims to constantly improve the methodology and process to collect, analyse and respond to learning needs. The contractor is expected to develop and implement focussed and specific learning needs assessments that allow the identification of training activities among other interventions to address the learning needs.

Quality requirements for the plan of learning needs assessment

The plan of the learning needs assessment shall include the methodology, and the plan for data analysis (1-2 pages). Interview guides, questionnaires shall be annexed. The data collection shall be done via EU-survey. All collected documents, such as interview recordings or transcripts, survey responses must be well organised, named and *anonymised*, processed and stored according to the Article I.8 - Processing of personal data of the draft contract (see Annex II in the tender documents).

Quality requirements for the preliminary reports of learning needs assessment

The choice of methodology will depend on availability of recent documentation to analyse. In case of a documentary analysis, a desk review is necessary with appropriate referenced summary of findings. In case of a need for data collection, up to 20 interviews or a survey with around 300 participants considering a diverse geographic and demographic distribution of the potential target audience shall be performed, and analysis of findings needs to be presented and documented. The learning needs must be translated into operational learning objectives.

The preliminary reports of learning needs assessment (3-4 pages) should include a description of the methodology, main findings, implications and learning objectives. The recommendations must be aligned with the identified learning needs.

Quality requirements for the final report

The final report shall be based on the data analysis and needs and include the proposals to improve the processes on how to conduct future needs assessments. Depending on the complexity of the project, the report can be between 5 and 30 pages including at least the table of contents, list of abbreviations, executive summary, introduction/background, detailed analyses, conclusions and recommendations and references, annexes (where applicable) and shall ensure that the following requirements are met:

- relevance of the identified learning needs to organisational goals
- clarity and comprehensiveness
- at least 5 actionable recommendations are provided.

Tasks, deliverables, and timelines (WP1)

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be adjusted in the specific contract)*	Profiles required for implementing the deliverables
WP1D1	Plan of learning needs assessment	Identify the most relevant approach to assess the needs.	Delivered within 2-4 weeks of the start of the WP as indicated in	Done by Profile Senior Instructional Designer (SID).

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be adjusted in the specific contract)*	Profiles required for implementing the deliverables
		List the most relevant evidence that needs to be assessed (either documents or list of key informants or description of the sample to be surveyed).	the request for services.	
WP1D2a	Preliminary report of learning needs assessment	Extract and analyse the information collected by ECDC from various sources and through different channels. Analyse the quantitative and/or qualitative data. Describe main findings and implications.	Delivered within 3-5 weeks of the start of the WP as indicated in the request for services.	This deliverable shall be done by Profile SID
WP1D2b	Preliminary report of learning needs assessment, including data collection	Collect and analyse information from various sources and channels identified by the contractor (estimated 15) on behalf of ECDC. The contractor is expected to suggest sources or channels for information which are new to ECDC. Analyse the quantitative and/or qualitative data. Describe main findings and implications.	Delivered within 7-9 weeks of the start of the WP as indicated in the request for services.	This deliverable shall be done by Profile SID
WP1D3	Presentation of results of learning needs assessment	Organise, send invitation and agenda for 3-hour online meeting for a group of 10-15 content matter experts (usually ECDC experts or ECDC National Focal Points) to present and discuss main findings, to collect the feedback on the preliminary results on the assessment. Support participants if technical issues arise.	Delivered within 8-12 weeks of the start of the WP as indicated in the request for services.	The presentation shall be done by Profile SID.
WP1D4	Final Report of learning needs assessment	Finalise the Report.	Delivered within 10-15 weeks of the start of the	

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be adjusted in the specific contract)*	Profiles required for implementing the deliverables
		Personal data collected during the assessment must be erased 4 weeks after ECDC's acceptance of this deliverable.	WP as indicated in the request for services.	

Work package 2 - Design and creation of self-paced learning assets

Aim

ECDC has a catalogue of self-paced online learning assets (micro learnings, instructional videos, e-learning courses) and would like to expand to offer additional online self-paced assets.
The contractor is expected to:

- Develop the scientific content of the learning asset with content matter experts (CME) identified by the contractor to provide the content based on the requirements provided in the specific contract **or** work with ECDC CMEs providing the substance, **and**

- Design and develop the online learning assets ensuring effective delivery and engagement. This involves creating digital learning experiences delivered via technology, balancing pedagogy, interactivity, and usability for effective online learning to facilitate learning in a flexible, accessible, and engaging format. The delivery will be through the ECDC learning management system (LMS) called Learning Portal. The formats can vary, such as: e-learning courses (blended and standalone), e-learning pills (micro learning), quizzes, games, interactive simulations or assessments, virtual labs, tutorials and educational animations on public health related topics.

Description and quality requirements for the self-paced learning assets

The self-paced learning assets will be hosted in the ECDC Learning Portal with free of charge access and available as an open educational resource. A summary page needs to be created by the contractor in the ECDC Learning Portal for each asset with a short overview (title, summary, key objectives, target audience, duration/dates, table of content, keywords). Metadata for internal content organisation shall also be defined in ECDC Learning Portal such as: the date when the asset should be reviewed in the future, ECDC contact person, language, publisher, search terms, related competencies, related disease area, related public heath function, etc. Each standalone learning asset will have a dedicated page in the ECDC Learning Portal where the contractor is expected to create content to populate the following areas: introduction, pre-course survey and other reading, course materials, additional materials, course evaluation and certificate using ECDC templates.

For all the self-paced learning assets the contractor will provide an initial draft or a prototype of the final deliverables for ECDC's review. The timeline for provision of an initial draft or a prototype will be specified in the request for services. The initial drafts and/or prototypes shall be submitted to allow incorporating the feedback and revision to meet the deadline for provision of the final deliverables.

- Requirements for **e-learnings:**

Depending on the topic and the learning objectives, each self-paced e-learning asset can vary in length but should be structured in storytelling capsules typically 30' long that incorporate visual media, branching, examples and exercises. The content is produced in Articulate 360 (Rise or Storyline), in line with the visual style of the ECDC template for e-learning courses. Generally, ECDC courses are designed to be self-paced. The e-learning asset might be used as a standalone course and/or as a distance format module of a blended course.

Quality requirements for the e-learnings

- accuracy and relevance of content,
- alignment with learning objectives,
- use of diverse instructional methods (e.g., videos, quizzes, interactive elements): minimum of 2 methods per 15 minutes,
- compliance with ECDC accessibility standards,
- online tests include clear explanations on how to solve each individual exercise and the right answers to the tests.

- Requirements of the **course design document:**

The course design document for a 30' course (in an agreed template) that serves as a blueprint for course development, ensures that all elements are aligned with the learning objectives and provide a cohesive learning experience. They shall include:

- title and course information and any relevant metadata (e.g. course code, version),
- target audience, learning objectives, and estimated duration,
- introduction and overview briefly introducing the topic and the context for learners explaining the purpose of the course and what learners will gain from it,
- content structure dividing the module into sections or topics will be briefly described and linked to the course objectives,
- the types of interactions with brief summaries of their content linked to the appropriate levels of the learning objectives.

Quality requirements for a course design document

- Clear goals that define what learners should achieve by the end of the course,
- A structured breakdown of the topics and materials to be covered,
- Methods and activities to engage learners and facilitate learning,
- Tools and techniques to evaluate learners' progress and understanding.

- Requirements of the **storyboard:**

The Storyboard shall use storytelling techniques to organise the content in a logical and interesting order. It shall make use of relevant gamification elements to keep adult learners engaged. If the content and the storyboard was developed by ECDC staff, at least 2 meetings should be organised with the CMEs to allow the contractor to provide input and understand the project.

Quality requirements

- outline the sequence of content (text, images, videos, etc.) within each section describing visuals (images, diagrams, infographics) and their placement, indicating where multimedia elements (videos, animations) will appear, script for any audio narration or text-based content, instructions for voiceover or text-to-speech,
- interactivity and assessments (for example quizzes, drag-and-drop activities, simulations),

- assessment questions, correct answers and feedback for each alternative selected by learners,
- explanation of the navigation and user experience including the navigation flow design (e.g., next/previous buttons, menu), user interactions (clicks, scrolls) and transitions,
- note of any technical requirements (e.g., browser compatibility, screen resolution), file formats (e.g., MP4 for videos, PNG for images).

➢ Requirements of an **educational animation**:

They should be structured to simplify complex concepts, making them easier to understand and remember. They should also engage learners more effectively by combining visual and auditory elements, catering to different learning styles.

Quality requirements

- well-developed script that conveys information effectively,
- alignment with learning objectives and theory,
- professional visual design that engages learners.

➢ Requirements of a **video interview and podcast** with a scientific expert:

For a video interview and podcast with a scientific expert in the context of online training assets, the contractor must ensure that high-quality audio and video recording equipment is used to capture clear and professional content. This includes to prepare a structured yet flexible interview guide with relevant questions to facilitate an engaging and informative discussion. Additionally, the contractor must secure proper permissions and ensure that the content is accessible to all learners by providing transcripts and subtitles.

Quality requirements

- Content: relevance to the field of expertise addressing important scientific questions or insights,
- Expert: credibility and expertise in their field with a strong research background and relevant experience,
- Interview dynamic: engaging, clear, concise, adequate pace between questions and answers,
- High-quality audio and video.

Tasks, deliverables, and timelines (WP2)

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*	Profiles required for implementing the deliverables
WP2D1	30’ Course design document	Analyse the ECDC need and propose a high-level solution course design document	Course design document delivered within 4 weeks of the start of the WP as indicated in the request for services.	This deliverable shall be done by SID profile in collaboration with the Content Matter Experts (CMEs).

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*	Profiles required for implementing the deliverables
WP2D2	Storyboard for a 30' learning asset with the scientific content development	Provide scientific content and create a detailed Storyboard as specified above, explaining what will be presented to learners visually and orally at each moment of the e-learning.	Delivered within 5-8 weeks of the start of the WP as indicated in the request for services. .	An SID and at least 1 CME are the profiles needed to produce this deliverable.
WP2D3	e-learning pill (up to 15')	Upon approval of the Storyboard WP2D2 to develop the e-learning pill. Upon request, educational animations or videos will need to be added as well as translated captions and audio outputs. The final asset must be integrated in the ECDC Learning Portal with the description as specified above and using ECDC templates.	Delivered maximum 4-6 weeks after the approval of the Storyboard.	
WP2D4	30' e-learning course	Upon approval of the Storyboard to propose a prototype for ECDC's approval. Upon request, educational animations WP2D5 or videos WP2D6 will need to be added as well as translated captions WP2D8 and audio outputs WP2D7. Develop the final version of the e-learning course. The final asset, that might be longer than 30' if other assets were added, must be integrated in ECDC Learning Portal with the description using ECDC templates.	Delivered within 6-9 weeks after the validation of the Storyboard.	
WP2D5a	5' educational animation *(providing the scientific content)*	Provide the scientific content and a Storyboard in an agreed template. A prototype must be provided for ECDC's review, and the feedback must be integrated in the final version. Produce the animation and integrate it in a training asset.	8-10 weeks upon approval of the storyboard.	This deliverable shall be done by profiles CME, SID and Audio-Visual Expert (AVE).

Deliv erabl e #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*	Profiles required for implementing the deliverables
WP2D5b	5' educational animation	ECDC provides the scientific content on a storyboard. The contractor provides prototype. The contractor produces the educational animation and integrates it in a learning asset.	6-8 weeks after the launch of the start of the WP as indicated in the request for services.	This deliverable shall be done by profiles SID and AVE.
WP2D6a	5' video interview of an expert (with the scientific content provided by the contractor)	The scientific content is provided by the contractor. Develop interview questions and script. A prototype must be provided for ECDC's review, and the feedback must be integrated in the final version. Produce the video. The video can be a standalone product or can be integrated into another training asset. ECDC will provide the format type needed for the final product.	8 -10 weeks after the start of the WP as indicated in the request for services.	This deliverable shall be done by profiles CME, SID and AVE.
WP2D6b	5' video interview of an expert (with the scientific content provided by ECDC)	The questions and the content for the interview will be provided by ECDC. A prototype must be provided for ECDC's review and the feedback must be integrated in the final version. Produce the video. The video can be a standalone product or can be integrated into another training asset. ECDC will provide the format type needed for the final product. The contractor oversees and implements the editing the video as needed.	6 -8 weeks after the start of the WP as indicated in the request for services.	This deliverable shall be done by profiles including SID and AVE.
WP2D7	Audio output 15'	Provide professional, or AI assisted voiceovers for the learning asset; complete editing tasks and integration in the learning asset.	To match delivery deadline of an asset.	
WP2D8	Translated subtitles for	Incorporate feature into the videos.	To match delivery deadline of an asset.	

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*	Profiles required for implementing the deliverables
	15’ per language			
WP2D9	Update of e-learning asset (of previous editions) for a 1-hour training asset	Based on the evaluation, identify and suggest improvements for ECDC approval. Update the training material.	6 to 10 weeks after the start of the WP as indicated in the request for services.	
WP2D10	30’ audio podcast	Create and publish in the Learning Portal an audio-based training material where scientists present and discuss a topic. The scientific content is provided by the contractor. The panel is approved by ECDC.	8-12 weeks after the start of the WP as indicated in the request for services.	

Work package 3 - Design, creation, and delivery of instructor-led training

Aim

The purpose of the instructor-led training assets is to introduce the participants to a certain topic or further expand their knowledge and expertise on that topic. It should also aim at supporting and encouraging exchange of expertise, discuss good practices and share lessons learned on the topic. Therefore, these trainings can include presentations by one or more technical experts, with participants encouraged to discuss the specific subject matter to foster the sharing of knowledge and expertise and encourage networking. It can also consist in the exchange of best practices based on a study or report and/or the presentation of case studies.
These training should be developed in a participatory and inclusive manner, allowing for individual and/or in groups activities to discuss and solve specific tasks and gain hands-on experience.
The specific topics and the dates of these training events will be defined in the specific contract by the Contracting Authority. The trainings will most-likely cover niche/very specific topics in prevention, preparedness and response of communicable diseases. It is estimated that up to 4 trainings on different topics will be implemented per year.

The duration of the trainings shall be 2,3,4 or 5 days. Trainings will be delivered in English, on the ECDC’s premises or in other external premises in any EU/EEA country or remotely via virtual classrooms. Sessions may be web streamed and/or recorded and used as learning assets.
Depending on the topic, the applied learning methodology and other needs defined by the ECDC, these events can be organised as:
- fully online as interactive, or
- in-person events, or
- blended events (with online components supporting a face-to-face event).

The number of participants is usually between 10-30 participants, 31 to 60 participants and 61- 100 participants (i.e. a cohort). ECDC will provide the contractor with the participants needed contact information (i.e. names, email addresses, affiliations).

Under this WP the contractor is expected to develop the training material, propose the pedagogical approach and the trainers, develop and perform participant assessment and course evaluation. The contractor will deliver reports for all the synchronous trainings activities. The report shall include a summary of the training activities carried out during the training, the list of participants, date and place of the training in addition to the results of the evaluation and assessment including their interpretation and implications regarding updates to the training curriculum for future trainings delivered for a similar audience. The contactor will also organise a post training virtual meeting with minutes. The agenda of the meeting should include at least:

- overall evaluation and assessment of the training,
- areas that worked well,
- areas for improvement and potential solutions. Foreseeable changes to apply to the training material and delivery methods will be discussed.

The learning assets for synchronous trainings

Developing a learning asset for synchronous trainings involves:

- Developing the purpose, learning objectives of the intended learning activities.
- Producing a detailed curriculum for synchronous trainings (to ensure continuity and a coherent approach among trainers delivering the same content) describing the training asset for a cohort with a narrative of the individual modules (competencies target audience, aim, , objectives, content, planned activities, methodology, timing). In each module there are different training activities in different formats. It should include:
    - ➢ a pre-learning module before the instructor-led interaction,
    - ➢ modules with instructor led interaction,
    - ➢ a post-training module,
    - ➢ a cascading module,
    - ➢ documents, teaching aids, equipment, evaluation tools, etc.
- Producing a short description of the course or event for synchronous trainings, and/or filling in the ECDC Learning Portal.
- Producing a short teaser to promote the course/event for synchronous trainings.
- Creating course support material for synchronous trainings (presentations, handouts, documents, tests).
- Creating or identifying case studies or table-top exercises for synchronous trainings.
- Developing a plan of participants assessment and course evaluation for synchronous trainings.
- Drawing up pre- and post-course tests, to assess knowledge before and after the course for synchronous trainings.
- Evaluating the course considering alignment with learning objectives, accuracy and currency of the information, relevance to audience, clarity and comprehensibility of the material, practical application to real-world situations, engagement and interactivity and assessing participants' gained knowledge.

The pedagogical approach for adult learners

The format of the training asset proposed by the contractor must ensure the following principles and **quality requirements**:

- Is proactive and engaging.
- Uses real world examples that are relevant to the trainees.
- Includes time for participants to discuss and work with each other.
- Entails intellectual challenge, relevance and practical application.
- Theoretical lectures must be reduced to the strict necessary. A concept can be introduced in lecture format, rapidly synthesizing theory, but must be moved quickly to inquiry and discussion.
- Adding theory to practice, participants can be broken up into smaller groups and be given hands-on activities that are part of the learning experience. Participants might also be offered different activities/sessions to choose from whenever relevant. The format should allow for stocktaking and networking, fostering future collaborations / networking among participants.
- Emphasizes the participants' experience sharing and experience.
- The training should include innovative approaches to assess the development of competencies as well as dimensions linked to the self-perceived confidence in the future application.
- Uses guided reflection to assess own learning.

Quality requirements for a curriculum

- Training aim: clearly define the purpose and goals of the training.
- Identify the competencies associated with the training session.
- Establish SMART learning objectives for the training asset.
- Outline the anticipated learning outcomes for the training asset.
- Provide a detailed list and description of the training activities, including a mapping to the corresponding training material.
- Specify the format for each training asset (e.g., synchronous, online, blended, clinics) and justify the choice of format.
- Indicate the duration of each training asset.
- Develop an assessment plan to measure participants' learning outcomes.
- Propose pre-learning and post-training activities.
- Include profiles of the trainers and facilitators leading the training activities.
- Provide a complete list of the training materials.
- Develop an evaluation plan.

Quality requirements for a dedicated page on the ECDC Learning Portal prior to the training

- Use the ECDC templates available in the Learning Portal,
- Include the learning material, assessments and evaluations, pre and post course activities,
- Create and upload biographies of the trainers.

The trainers and facilitators

The list of trainers and facilitators is agreed in advance with ECDC. It is of the responsibility of the contractor to ensure that trainers and facilitators having experience in EU context (from the public or private sector, including academia, health professionals and civil society associations) and on the topic are invited to give lectures, speeches or presentations.

➢ For face-to-face trainings:

- At least 2 trainers per day (8 hours) are needed for the entire duration of a training up to 60 participants and 3 trainers per day for the entire duration of the training for groups above 60 and up to 100 participants.

- All trainings include sessions where participants work in groups. To facilitate this work, two or more facilitators are needed for every 30 participants. A trainer can be a facilitator.

- Additional experts can be invited for short presentations online or face-to-face to provide a particular point of view or experience.

➢ For online synchronous trainings up to 100 participants:

- 3 trainers and 6 facilitators are needed.

In the training approaches used, in their attitude, and the content of the services provided, the trainers and facilitators must respect and promote the values of the European civil service, in particular equality, dignity, solidarity, justice and respect for rights and freedoms.
In this regard, the code of conduct, ethics, scientific independence both personal and professional, will play an important role. Tenderers must also be aware that ECDC applies a policy of equal opportunities and promotion of diversity and they must take account of this both in their tender(s) and, where relevant, during performance of the contract.

Trainers and facilitators' responsibilities during a training event:

- Using adequately the technology provided and if necessary, provide basic help to participants for the use of those tools.

- Explaining the learning objectives clearly to participants at the beginning of the course.

- Running the course to strive to maximise the chances that all participants will achieve their learning objectives, by drawing parallels with their specific working environments.

- Remaining attentive to participants' needs.

- Using the learning management system ECDC Learning Portal to continue interacting with participants, upload training materials, sending surveys and test results, etc.

Tasks, deliverables, and timelines (WP3)

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*
WP3D1	Detailed curriculum of the training asset for 1-day (In the financial proposal please indicate the price per 1-day training. For the trainings of longer duration, the price of this DL will be multiplied by the number of days)	Develop a detailed curriculum, corresponding to the target audience and the training needs provided by ECDC or identified by the contractor for ECDC's approval. Consider that the training activities can be a blend of synchronous training (F2F and online), self-paced activities (e-	Within 6-8 weeks after the start of the WP as indicated in the request for services.

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*
		learning and individual/group work), and drop-in clinics, among others.	
WP3D2a	Report of a 1-day face-to-face training for up to 30 participants. (In the financial proposal please indicate the price per 1-day training. For the trainings of longer duration, the price of this DL will be multiplied by the number of days)	Create before the training a dedicated page on the ECDC Learning Portal and include the learning material, evaluations, pre and post course activities. Draft and upload biographies of the trainers. Delivery of the training, assessment and evaluation.	A dedicated page shall be created at least 3 weeks before participants' enrolment. The Report shall be submitted maximum 4 weeks after the delivery of the training.
WP3D2b	Report of a 1-day face-to-face training for up to 60 participants. (In the financial proposal please indicate the price per 1-day training. For the trainings of longer duration, the price of this DL will be multiplied by the number of days)	Create a dedicated page on the ECDC Learning Portal and include the learning material, evaluations, pre and post course activities. Draft and upload biographies of the trainers. Delivery, evaluation and assessment of the training.	A dedicated page shall be created at least 3 weeks before participants' enrolment. The Report shall be submitted maximum 4 weeks after the delivery of the training.
WP3D2c	Report of a 1-day face-to-face training for up to 100 participants. (In the financial proposal please indicate the price per 1-day training. For the trainings of longer duration, the price of this DL will be multiplied by the number of days)	Create a dedicated page on the ECDC Learning Portal and include all the learning material, evaluations, pre and post course activities. Draft and upload biographies of the trainers. Delivery, evaluation and assessment of the training.	A dedicated page shall be created at least 3 weeks before participants' enrolment. The Report shall be submitted maximum 4 weeks after the delivery of the training.
WP3D3	Report of a 1/2-day synchronous online training up to 100 participants (In the financial proposal please indicate the price per 1-day training. For	Create a dedicated page on the ECDC Learning Portal and include the learning material, evaluations, pre and post course activities. Draft and upload biographies of the trainers.	A dedicated page shall be created at least 3 weeks before participants' enrolment. The Report shall be submitted maximum 4 weeks after the delivery of the training.

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*
	the trainings of longer duration, the price of this DL will be multiplied by the number of days)	Delivery, evaluation and assessment of the training.	
WP3D4	Post-training meeting minutes	Organise one-hour on-line meeting with ECDC after the training and corresponding minutes. The contractor shall present the results of the evaluation and adjustments for the upcoming events.	3-5 weeks after the end of a training asset. Delivered once per training asset.

Work package 4 – Update, design and creation of training material for trainers

Aim

To provide for trainers who will train other trainers "train the trainers" the full package of training material needed for implementation of training activities.
The contractor will design and create training material for trainers to meet the needs of a target audience as described in the specific contract.

Description

➢ **The "train the trainer" toolkit** should include the following essential elements:
- Facilitator's guide: provide step-by-step instructions for trainers, including timing, discussion points, and tips.
- Learning objectives: clearly define the goals and outcomes of the training activity.
- Curriculum: describe the structure of the content in time.
- Content of the modules: organise the toolkit into modules or sections covering relevant topics. Include materials, presentations, and activities for each module.
- Teaching techniques and strategies: provide guidance on effective teaching methods, such as active learning, group discussions, and role-playing.
- Assessment tools: include assessment methods (e.g., quizzes, evaluations).
- Resources: offer additional materials like handouts, reference guides, and recommended readings.
- Case studies and scenarios: provide real-world examples to illustrate concepts and enhance practical understanding.

Quality requirements:
- Accuracy and relevance of training materials,
- Alignment with adult learning principles,
- Use of diverse instructional methods (e.g., case studies, role-playing, interactive activities): minimum of 3 methods per module.

➢ The **facilitation guide for a discussion-based exercise** based on a problem or case study can take different forms. The exercise can be designed around the analysis of didactic examples (aka case study) where the groups are invited to discuss that case. Alternatively, the exercise can be presented as a problem to be solved where the group must figure out the solution to the problem based on material/tools provided or previously covered in the course. Gamification elements must be considered to increase engagement.

Quality requirements:

- content must be realistic and scientifically sound,
- prompts for engagement must be clearly identified and interestingly designed to keep learner's engagement,
- the facilitation guide must allude to different types of reactions expected from the audience and provide tips on how to address them, as well as further references for in-depth knowledge.

➢ The **presentation of scientific content for a lecture** for a face-to-face or online synchronous facilitation shall include:

- Title slide with title of the presentation, name and affiliation of the presenter, date of the presentation.
- Introduction slide: brief background information, aim and learning objectives of the training according to Bloom taxonomy, outline of the presentation.
- Main content slides.
- Concluding slides: summarising the key findings, highlighting the significance of the results, suggesting future directions or applications.
- Acknowledgment slides: recognising contributors, funding sources, and any other support.
- References slide: citing all sources of information, data, and images used in the presentation.

Quality requirements:

- Each slide shall contain a detailed explanation of the content that needs to be presented by the trainer in the comments section.
- One idea per slide: each slide should convey a single main idea.
- Clear and concise text: use bullet points sparingly; opt for short, clear sentences.
- Visuals: use images, diagrams, and charts to break up text and illustrate points.
- Consistency: maintain a consistent style, font, and colour scheme throughout the presentation.
- Readable fonts: ensure text is large enough to be read from the back of the room.

➢ For the **preparation** and the **update** of the material, the **quality requirements** are:

- Relevance: ensure that the content is relevant to the target audience. It should address their specific needs and challenges.
- Ethical: should adhere to ethical guidelines and principles. Avoid any content that could be harmful or discriminatory.
- Evidence-based: base the training content on reliable evidence and best practices. Use research, case studies, and proven methods.
- Effectiveness: should lead to effective learning outcomes. It should equip trainers with the necessary skills and knowledge.
- Feasibility: consider practicality, i.e. trainers can realistically implement the content and that it is feasible within their context.
- Sustainability: design the toolkit with long-term impact in mind explaining how trainers can continue to benefit from it over time.

Tasks, deliverables, and timelines (WP4)

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*	Profiles required for implementing the deliverables
WP4D1	"Train the trainer" toolkit for a 1-day training including the training materials development	Develop all the content of the toolkit	8-12 weeks after the start of the WP as indicated in the request for services.	This deliverable shall be done by CME and SID profiles.
WP4D2	"Train the trainer" toolkit for a 1-day training based on the training material, provided by ECDC	Develop all the content of the toolkit.	5-8 weeks after the start of the WP as indicated in the request for services.	This deliverable shall be done by CME and SID profiles.
WP4D3	Facilitation guide for a discussion based 3-hour exercise	Develop the guide based on a problem or a case study.	8-12 weeks after the start of the WP as indicated in the request for services.	
WP4D4	Presentation of scientific content for a 45' lecture	Develop and present a scientific content to be used in a face to face or online synchronous course.	6 to 10 weeks after the start of the WP as indicated in the request for services.	This deliverable shall be done by CME
WP4D5	Update of training material (of previous editions) for a 1-day (8 hours) course. *(It is expected that three man/days are needed to complete this DL)*	Assess the relevance of the training material. Update the training material.	6 to 10 weeks after the launch of the start of the WP as indicated in the request for services.	This deliverable shall be done by CME and SID profiles.

Work package 5 - Design and delivery of webinars

ECDC offers webinars to their stakeholders. The ECDC Learning Portal is available to support online training events, which among others, may be individual webinars or webinar series.
Webinar participation may be offered publicly to anyone interested in joining or restricted to a selected audience.
The specific need and target audience will be described in the specific contract.

The contractor shall be able to develop, organise and deliver webinars. The duration is a half-day (4 hours).

- In case of a webinar targeted to a specific audience, ECDC will identify the participants to the webinar and the contractor will send the invitations at least 5 weeks prior to the date of the webinar. Otherwise, in case of open webinars, the contractor shall propose a dissemination plan to increase the awareness of potentially interested individuals of the event and maximise the number of enrolments and operationalise it at least 3 weeks prior to the date of the webinar.

- Following agreement on the topics to be covered, the contractor must propose at least two speakers per a webinar, experienced in presenting the selected topics for ECDC's approval The contractor will provide a pre-reading material (e.g. relevant publications, guidance, web links, software) to the participants at least 3 working days before the webinar.

- The contractor will record the webinars for participants to watch at their own pace and shared with other interested people. The questions and answers and discussions will be excluded. The contractor will create the space in ECDC Learning Portal for the recordings and other materials. The contractor will provide ECDC with the edited and cleaned recording in an agreed format.

  Quality requirements for the recordings:
  - Adding introductory and concluding slides.
  - Trimming out logistical segments (e.g., setup time, breaks) that aren't relevant.
  - Enhancing audio quality.
  - Incorporating visual elements (e.g., graphics, subtitles).
  - Removing parts of the recordings which do not contribute to the learning of future learners who watch recorded webinars.
  - The Editing of the recording must be performed by the AVE profile.
- After the event, the contractor shall submit a short (max 2-page) document (key message summary sheet) with the key-messages of the webinar. This document will be made available to the participants in ECDC Learning Portal maximum 10 days after the webinar.

- The ECDC Learning Portal space will be re-configured after the event to:

  - close enrolments to the live webinar;
  - open enrolments to watch the recording;
  - make available the presentation support files;
  - indicate that recordings are being processed;
  - remove all live event instructions.

- The ECDC Learning Portal space shall be re-configured when recordings are ready to:

  - upload the edited recordings;
  - upload the key-messages summary sheet;
  - announce that the recording is available.

The contractor will provide a team covering the following functions that are needed for each Webinar. One person cannot cover more than one function:

  - **Speakers** – Two or more persons knowledgeable in the content, experienced in presenting a topic in their field of expertise, who can speak clearly and engagingly in English.

- **Technical Support** – A person with full control over the technology to troubleshoot speaker's and participants' technical issues with audio and video connections, screen sharing, granting permissions to co-speakers, distributing files for download, performing the recording, scheduling the webinar, distributing URL to connect, setting up the access password if needed.
- **Webinar organiser** – The lead person collecting the topics, finding a suitable date, communicating to the participants, promoting it in social media to recruit participants, making technical rehearsals with the speakers, following up on action points.
- **Moderator** – One or more persons depending on the size of the webinar audience and on the level of interactivity. Moderators can support break-out sessions, monitor the participants' requests to intervene, answer foreseen questions, collect questions from the audience and reformulate them in aggregated way for the speaker to reply live during the webinar.

Tasks, deliverables, and timelines (WP5)

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*
WP5D1	Webinar space in ECDC Learning Portal with dissemination plan	Configure LMS page for the webinar to describe the activity, metadata-tag it and setup for an intuitive learner experience. Propose a dissemination plan describing how the webinar will be promoted, indicating draft messages and propose channels for announcement and critical timings to reach the target audience. Disseminate the information.	At least 3 weeks before the webinar.
WP5D2	Report on delivery and moderation of the webinar up to 4 hours	Deliver, moderate and record the webinar. Produce the key message summary sheet. Edit the recording of the webinar as an instructional video.	The dates for each webinar will be agreed upon considering other ongoing training activities. Report shall be submitted within 1 week after the event.
WP5D3	Report on reconfiguration of the webinar space from a live event to an instructional video	Adapt the Learning Portal space to present the video. Make available the recording and the key message summary sheet on the ECDC Learning Portal	Within 10 days after the event.

Work package 6 – Impact evaluation and online learning material evaluation

Aim

Trainings and training material pilot can be evaluated in different phases of the implementation. This work package focuses on evaluations of pilot e-learnings, evaluations of existing online training material and impact evaluations to update the existing training as needed.

The main focus is the evaluation of the scientific relevance of training material ensuring that the content is accurate, up-to-date, and applicable to the intended audience. The contractor must assess the following:

- Alignment with objectives: ensure the material aligns with the specific learning objectives of the training program.
- Accuracy and currency: verify that the information is accurate and up to date. Check the publication dates of sources and ensure that recent scientific updates are included.
- Source credibility: evaluate the credibility of the sources used in the material. Prefer peer-reviewed journals, reputable institutions, and recognized experts in the field.
- Relevance to audience: consider the background and needs of the audience. The material should be relevant to their level of expertise and applicable to their professional needs.
- Clarity and comprehensibility: assess whether the material is clearly written and easy to understand. Complex concepts should be accessible to the intended audience.
- Practical application: determine if the material includes practical examples, case studies, or applications that illustrate how the scientific concepts and content can be applied in real-world scenarios.
- Engagement and interactivity: check if the material includes interactive elements such as quizzes, discussions, or hands-on activities that engage the learners and reinforce the content.
- Feedback and evaluation: look for opportunities where learners have provided feedback on the material and for the material to be evaluated and updated based on this feedback.

Description of the deliverables and quality requirements

➢ **The evaluation report** of follow-up activities and long-term effects of an instructor-led course should contain the analysis of results of the long-term effects of the training session as well as the interpretation and implications regarding updates to the training curriculum for future trainings delivered for a similar audience.

  Quality requirements
  - Clearly present the analysis of the long-term effects of the training session, including detailed data and findings.
  - Comprehensively cover the interpretation and implications for updating the training curriculum, ensuring all relevant aspects are addressed.
  - Be grounded in solid evidence, using reliable data sources and appropriate methodologies to analyse the long-term effects.
  - Include references to relevant studies, surveys, or feedback that support the conclusions and recommendations.
  - Provide clear, actionable recommendations for updating the training curriculum based on the analysis and interpretation of the results.
  - Recommendations should be practical, specific, and tailored to the needs of future training sessions for a similar audience.

- The objective of an **evaluation report for a pilot edition of an online training course** is to assess the effectiveness, feasibility, and overall quality of the course. This includes identifying strengths and weaknesses, gathering feedback from participants, and making recommendations for improvements before the course is rolled out on a larger scale.

  Quality requirements
  - include a thorough analysis of both qualitative and quantitative data collected during the pilot,
  - provide detailed insights into participant feedback, course engagement, learning outcomes, and any technical issues encountered,
  - offer specific, practical recommendations for improving the course based on the findings,
  - the recommendations should be feasible and directly address the identified issues, aiming to enhance the course's effectiveness and user experience.

- The objective of a **routine evaluation report for an ongoing online training asset** is to continuously monitor and assess the effectiveness, engagement, and quality of the training. This helps to ensure the training remains relevant, effective, and aligned with organisational goals. The report should be 3–5-pages.

  Quality requirements
  - track key performance indicators that will be provided by ECDC (KPIs) and metrics over time, ensuring accuracy in data collection and analysis,
  - include comprehensive feedback from participants, highlighting their experiences, satisfaction levels, and engagement with the training,
  - analyse engagement metrics such as completion rates, participation in interactive elements, and time spent on the course.

Tasks, deliverables, and timelines (WP6)

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*
WP6D1	Evaluation report of follow-up activities and long-term effects of an instructor-led course	Use the evaluation and assessment tools to collect long term effects, analyse, and develop the report.	6 weeks after the of the start of the WP as indicated in the request for services. The deliverable may be requested between six and 18 months after the training asset.
W6D2	Evaluation report of a pilot edition of an online training course developed by	The contractor pilots with 20-40 participants identified by ECDC. The contractor analyses the participants' comments and implements improvements to the asset to be approved by ECDC before final publication in ECDC Learning Portal.	Final version ready to be published within 4-6 weeks after launch of the pilot.

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*
	the contractor or ECDC		
W6D3	Report of routine evaluation of an ongoing online training asset	Analyse the data available on the learning platform with the criteria requested by ECDC. Interpret the data, present the results' draft report in a 30' on-line meeting to ECDC and collect the feedback. Finalise the report with the ECDC feedback.	4-6 weeks after the start of the WP as indicated in the request for services.

Complementary Deliverables to Working Packages

A. Project management, Meetings and Reports. Tasks, deliverables, and timelines

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*	Requirements and minimum quality standards, including the profiles required for implementing the deliverables
Report-D1	The specific contract management plan, minutes of the kick-off meeting including agreed tasks and timelines	Organise a two-hour kick-off teleconference meeting to discuss and agree on contract management plan, timelines and deliverables as well as to discuss all aspects concerning the implementation of the specific contract. A specific contract may include few working packages and/or few sets of deliverables from different working packages. The contract management plan shall be updated during the	The kick-off meeting will take place within two weeks of signing the specific contract. The draft contract management plan shall be presented at the teleconference. The meeting minutes and finalised contract management plan shall be submitted within 4 working days after the teleconference.	The contract management plan shall include aim and specific objectives, description of methodological approach, timeline, including a Gantt chart, organisation of the work (team structure, roles and responsibilities) risk management and mitigation measures, quality assurance processes, annexes (if necessary). The teleconference minutes should be a document (1-2

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*	Requirements and minimum quality standards, including the profiles required for implementing the deliverables
		implementation of the relevant specific contract if the need arises.		pages) with main discussions points, decisions taken and action points. As an annex, the list of meeting participants must be included.
Report-D2	Report on biweekly meetings with action points highlighted	Organise 60' biweekly teleconference to provide updates, summarise ongoing state of play and discuss any obstacle or issue. All WPs and deliverables will be included. These meetings will also be used by ECDC to provide the feedback on initial drafts and prototypes of the deliverables.	An agenda should be sent 48 hours prior to the meeting. Online meetings are expected to take place every 2 weeks, unless otherwise agreed with the ECDC Project Manager, over the course of the specific contract. The Reports shall be submitted within 4 working days after the meeting.	The Reports should be a document (1-2 pages) with main discussions points, decisions taken and action points. As an annex the list of meeting participants must be included.

B. Logistic organisation of training activities

The contractor will be responsible for all logistic and administrative aspects (e.g. send invitations, reply to questions from participants, announce the event, book venue, etc), regardless of the format of the event (e.g. in-person/online).
For the on-line training activities, the contractor shall implement the online space for online synchronous trainings.

Logistic organisation may be ordered in addition to WP3 - Design, creation, and delivery of instructor-led training assets.

When requested by ECDC, the contractor shall make the following arrangements and cover the costs for face-to-face training activities:

- travel, accommodation (including breakfast) and subsistence allowance for participants, including, trainers, facilitators,
- provide training facilities,
- provide coffee breaks, lunches and dinners.

Travel arrangements must be done according to the Annex 7 - Guidelines for contractors organising training events and meetings on behalf of ECDC. Face-to-face training activities will take place mostly in Stockholm or any other EU/EEA cities. The duration of the training activities may be 2-5 days, but most of the courses last three full days. The travel for participants, facilitators, trainers will need to be organised within EU/EEA countries. If a face-to-face training will involve participants from other countries their travel and daily substitute allowance will be arranged through other mechanisms.

Tasks, deliverables, minimum quality requirements and timelines

Deliverable #	Name of deliverable	Description of the tasks leading to the deliverable. The contractor must:	Estimated timeline *(may be slightly adjusted in the specific contract)*	Requirements and minimum quality standards, including the profiles required for implementing the deliverables
Logistic-D1.1 In the financial proposal it is requested to provide a fixed price (all inclusive) for the venue for 1 day, suitable for up to 50 participants. Logistic-D1.2 In the financial proposal it is requested to provide a fixed price (all inclusive) for the venue for 1 day, suitable for up to 100 participants.	Venue booking, including a progress report with description of the training facility and proposed set up for a training.	Search and propose a suitable venue/training facility for ECDC's approval. After ECDC's approval the booking shall be finalised.	The venue needs to be booked within 2-3 weeks of the start of WP as indicated in the request for services.	The venue should be accessible easily, otherwise the transfers from/to the venue shall be arranged and covered by the contractor. The facility includes a plenary room and at least three breakout rooms equipped as necessary for a training. Additional requirements may be included in the request for services.
Logistic-D2	Participants management including a list of registered participants.	ECDC will provide the contact details of the participants (up to 100 people). The contractor will send out the 'Save the date' message, Invitation Letter, manage the registration of participants for all type of events hybrid and on-line.	Registration of participants shall be completed 3 months prior to the start of a training asset.	The contractor will be provided with the templates of the documents. The contractor is expected to communicate with the participants in a service-minded manner and respond to the queries within 1 working day.

Logistic-D3.1 In the financial proposal it is requested to provide a fixed price to cover the costs of travel to and from the training, accommodation, and DSA per one attendee for one day. Logistic-D3.2 In the financial proposal it is requested to provide a fixed price to cover the costs of accommodation, and DSA per one attendee for one additional day.	Logistic arrangements including progress report.	Arrange travel and accommodation for attendees. Arrange for 2 coffee breaks and a lunch on each day of the training and one dinner per event. Provide daily subsistence allowance (DSA) to attendees. Update the progress report continuously in the course of the implementation. Finalise the report after the training has been held. Personal data shall be processed and stored according to the Article I.8. Processing of personal data of the model framework contract and erased 4 weeks after the approval of the deliverable.	Travel arrangements shall be completed at least three weeks before the start of a training asset. Progress report shall be updated continuously and ready to be presented to ECDC upon request. DSA must be paid maximum 2 weeks after the completion of the training course. Final report shall be submitted to ECDC 2-3 weeks after the end of the course.	Travel arrangements (including the subsistence allowance) shall be done according to the Guidelines for contractors organising training events and meetings on behalf of ECDC – Annex 7. Progress report shall include the description of the hotel accommodation, number of participants confirmed their attendance, number of completed bookings of travel vs number of bookings to be finalised. Attendance list shall be annexed to the Final Report and shall include Name, Surname, Country, affiliation of participants, trainers, facilitators, lecturers. Final report shall be submitted within one week after the training.

The contracting authority reserves the right to decrease the number of participants or replace the participants two weeks before the training. The cancellation policy for the hotel accommodation and travel tickets will be taken into account. (i.e. the replacement or decrease of the number of participants will be requested when the cancellation policy allows it)

C. Consultancy

In addition to the above deliverables, the contractor may be asked to provide ECDC with the expertise to support training activities in the scope of this framework, including (non-exhaustive list):

- Providing analysis, guidance and training(s)/workshop(s) to explore best practices to enhance ECDC's processes to create, maintain, deliver and archive training activities.

- Complementary activities to assess the impact of learning: evaluate the quality, efficiency and effectiveness of learning activities through pre-/post-testing, surveys, etc.
  The target audience of these activities are ECDC staff and stakeholders. The consultancy will be requested on an ad hoc basis and estimated to account for 375 days in total for the entire duration of the framework contract.
- The consultants may be at a junior or senior level
  - Senior level consultancy is foreseen to analyse ECDC practices and provide advice based on wider views on the subject.
  - Junior level consultancy is foreseen to support with searches, researching topics, conducting interviews with stakeholders and compiling data.
- Consultancy services will be carried out remotely.

The tasks and deliverables, number of hours needed, and the profiles will be described in the specific contract. (Please see the model specific contract 'Times and Means')

Depiction of the services:

Profile	Rate	Types of consultancy services	Minimum Quality Requirement. See the description of profiles in the section 3.2.3 – T4
Senior expert	1-day, on-line consultancy	Analyse, provide advice and guidance on best practices, processes, evaluations, technologies in digital and blended learning.	Profiles SID
Junior expert	1-day, on-line consultancy	Support with searches, researching topics, conducting interviews with stakeholders and compiling data.	Profiles JID, LT, AVE

Horizontal aspects related to all deliverables/WPs

Selection of Content Matter Experts

If the contractor does not have the specific expertise in their core team and when requested by ECDC, the contractor will search for profiles corresponding to the requirements for the role of the Content Matter Experts on a specific narrowed down topic and will submit up to 3 CVs for ECDC's approval. ECDC reserves the right to require additional proof of professional experience of proposed profiles. Content Matter Experts will need to have experience in development and delivery of trainings in public health applied to infectious disease in the EU/EEA.

The Content Matter Experts will develop the content for the learning assets for a specific target audience based on the identified training needs and/or have a role as a trainer for a synchronous training session. In some cases, ECDC will provide the Content Matter Experts, and the contractor will work on developing learning assets together with them. This will be specified in the request for services for a specific contract. It is anticipated that the selection of the Content Matter Experts will be requested for up to 20 activities per year.

The contractor will ensure that the Content Matter Experts complete the expected tasks and deliverables in time.

All documents (reports, presentations, guidance, toolkits, letters, etc) shall be written in high standard (C1 equivalent) British English language following good scientific practice and submitted in an editable format to allow versioning and peer-review using track changes and British English grammar and spelling. The figures, maps and other visuals shall follow the ECDC visual and design guidelines and be delivered as separate high-resolution files ready for publication. When relevant, references must be collected in a referencing management software compatible with EndNote X9 (software used at ECDC) without duplicates. Vancouver is the preferred reference style.
All deliverables shall be of publishable quality (content, format and language) suitable for publication on the ECDC website, following formal clearance by ECDC.

ECDC will provide all the necessary ECDC templates. For each report, a discussion shall take place between the ECDC project manager and the contractor to agree on the details of the scope and content. Generally, reports shall include at least the following chapters: table of contents, list of abbreviations, executive summary, introduction/background, detailed description of activities, results of activities, discussion on results/lessons learned, and conclusions/next steps.
The contractor will provide an outline and/or draft documents for review by ECDC and will incorporate the feedback into the final version of the documents. Note that no additional cost will incur to ECDC for such request; costs related to outlines and draft documents must be part of the overall cost of the deliverables.

Business continuity: The contractor shall ensure the continuity of the services during the entire duration of the projects; proper business continuity shall be guaranteed when a member of the team becomes unavailable. In any case, the services will be provided in a timely manner. The contractor must have the capacity to perform several DLs / or trainings concurrently.

Replacement of team member:
The contractor shall ensure an operationally experienced and expert team across all areas of the training asset/ course curriculum. At ECDC's request, the contractor must replace a team member who prove incapable of carrying out the specified tasks to the required standards (e.g. due to underperformance, improper conduct in service, prolonged absence). Any departure of a team member not requested by ECDC shall be communicated by the contractor without delay.
It shall be the contractor's responsibility to manage the replacement of their personnel/ sub-contractors to ensure that knowledge and information are transferred with minimum interruption of the services and that a high level of service quality is always maintained.

Communication policy
Any draft communication materials shall be approved by ECDC before dissemination. Letters approved by ECDC to be sent by the contractor on behalf of ECDC shall have the ECDC logo in the heading, shall be signed 'on behalf of ECDC and ECDC must be in copy of each correspondence with external contacts unless otherwise agreed by ECDC. All the training assets shall have only ECDC logo.
Any requests from third parties to the contractor related to the scope of this tender shall be directed to ECDC, as relevant and follow-up actions shall be agreed upon and coordinated with ECDC.

Requirements for future adaptation of the learning assets
All documents produced by the contractor must be delivered to ECDC in a format where ECDC can perform future edit and reuse in subsequent training activities. The contractor will agree on the format with ECDC for every specific learning asset. For example, PDF documents must be provided to

ECDC in word format, SCORM packages must also be delivered to ECDC in the Articulate 360 project format (Rise or story file), audio files with a realistic synthetic voice must also be received by ECDC on a word file containing the final script, including phonetic language annotations used to generate that audio file.

Requirements for user experience of the learner
• The e-learning assets must be responsive (accessible on desktop and mobile devices).
• The learner must be able to revisit the content of the learning asset after it has finished, as an on job aid reference.
• The content must be engaging with a sufficient level of interactivity and multi-media to capture the attention of an adult learner.
• The learner shall find connection points to further learning on various aspects of the content via references and links to related materials, where applicable.

Requirements for visual and learning design
• The contractor must consider the current best practices regarding e-learning and professional adult learning. By "best practices" it is meant that the contractor should use all techniques, methodologies that, through experience and research, have proven to reliably lead to an optimal result.
• Each learning asset shall be broken down in bite size content pieces to increase their reusability in being reassembled to create new learning assets or communication products.
• Commercial publicity and advertising are not permitted in the material.

Requirements for audio- and video-outputs
- Clarity and understandability,
- Avoid background noise or distractions,
- Use clear, well-articulated narration,
- Keep audio segments concise,
- Maintain a conversational tone,
- Engage learners with an inviting voice.

The files for subtitles in other languages must be generated in formats such as .srt, .vtt, or similar.

Language requirements
• The learning assets will be initially developed in British English.
• It must be considered that most of the users will not be native English speakers, hence usage of accessible language is valued.

Technical (IT) requirements

- E-learning assets should be developed using ECDC's chosen authoring tools, Articulate 360 suite or its evolution during the duration of this contract.

- The learning assets must be developed in a way that allows ECDC easy and instant updates of the training content and materials (including to remove and to add parts) after the end of the framework contract.

- The learning assets will be hosted in the ECDC Learning Portal, an up-to-date instance of Totara Learn eventually in combination with a user experience platform.

- For webinars and on-line trainings, the contractor must ensure the provision of a live streaming tool, ECDC approved, (e.g. Adobe Connect, Webex, MS Teams) allowing video and audio transmission in parallel with screen share and synchronous text interaction with participants. This tool shall be capable to host sessions up to 1.000 simultaneously connected participants. The tool must also enable pre-configuration of microphone and camera privileges to participants. It must also have integration with participant engagement tools such as polls, emotional reactions, and Q&A tabs. Attendance must be reflected in ECDC Learning Portal to allow to generate a certificate of participation.

Quality of training assets
The contractor must put in place a system to ensure the quality of the training assets.
All training assets require submission of an initial draft or a prototype (a prototype is a tangible or interactive model used to test and refine a product, while an initial draft is a preliminary version of a written document used to develop and organize content). If the content or the quality do not correspond to the requirements as described in these tender specifications, a revised version will need to be submitted for ECDC's approval. These amendments and revisions are under the sole responsibility of the contractor, and at its own costs.

Quality control also includes a language check of the documents by a native speaker and amendments to documents, e.g. updating legislative or bibliographical references.

After the completion of each course, participants will be asked to complete a 10-point satisfaction survey (with 10 being the highest level of satisfaction) on the ECDC Learning Portal, focusing on three areas:
- whether the learning needs have been met,
- quality of the trainer/facilitator,
- overall quality of the course.

Terms and definitions used in the tender specifications

The following terms and definitions are used throughout the tender specifications:

Term	Definition	Examples and description
Assessment	Evaluation of the acquired learning of the trainee	An assessment could evaluate learner's knowledge, development of competences, or their ability to apply those competences.
Educational animation	Is a visual and interactive tool designed to simplify complex concepts and enhance learner engagement through dynamic and engaging content. It uses animated graphics, characters, and storytelling to make learning more accessible and enjoyable.	
e-learning (or electronic learning)	Refers to the use of digital technologies and electronic media to deliver educational content and facilitate learning. E-learning allows learners to access educational resources anytime and anywhere, providing flexibility and	It encompasses a wide range of formats, including online courses, virtual classrooms, webinars, and interactive modules

Term	Definition	Examples and description
	convenience. It often incorporates multimedia elements such as videos, animations, and interactive quizzes to enhance engagement and improve the learning experience.	
Evaluation	Evaluation of the training session itself	Should be developed from 2 perspectives: • the participants' (training session evaluation) • the trainer, facilitator and/or Content Matter Experts (course implementation analysis)
Curriculum	Detailed description of the content of a training asset. It should be both learner-centred and accessible to different kinds of learners.	It should include: • Topic(s) covered • Learning objectives • A description of training materials needed • An outline of activities with estimated time periods • Description of the planned built-in assessments to check for trainee's understanding
Course	A course is a structured program of study designed to teach specific knowledge or skills through a series of lessons or modules. The difference between a course and training is that a course is typically more formal and focused on delivering educational content, while training is broader and emphasizes practical skill development and real-world application. In summary, training is a broader concept aimed at skill development and practical application, while a course is a more structured and formal educational program focused on teaching specific content	• Purpose: A structured program designed to teach a particular subject or set of subjects. • Scope: Typically has a defined curriculum with specific learning objectives and outcomes. • Format: Usually consists of a series of lessons or modules, which may include lectures, readings, assignments, and assessments.
Prototype	It is a preliminary version of an asset, offering a sample of specific functionality, designed interactions and a glimpse into the structure of the final product with an early preview of the major content elements. It is created to test and validate ideas, functionality, and design before full-scale production	It serves as a critical feedback tool, enabling designers to gather insights and make necessary adjustments early in the development process. It emphasizes the mechanics of the learning system under development. It will allow to fine-tune the learner experience, gauge course difficulty, and avoid late-stage changes.

Term	Definition	Examples and description
Training	Training is a systematic process designed to enhance an individual's knowledge, skills, and competencies through structured learning experiences. It aims to improve performance, productivity, and personal development by providing the necessary tools and resources to achieve specific goals. Training is an ongoing process that adapts to the evolving needs of individuals and organizations. It involves continuous assessment, feedback, and improvement to ensure that learning objectives are met and that participants can apply their new skills effectively in real-world scenarios.	Training can be delivered in various formats, including: 1. **Formal training**: structured programs with defined objectives, such as classroom instruction, workshops, and seminars. 2. **Informal training**: unstructured learning experiences, such as on-the-job training, mentoring, and self-directed learning. 3. **Technical training**: focuses on specific skills and knowledge required for particular tasks or professions, such as software training or machinery operation. 4. **Soft skills training**: enhances interpersonal skills, communication, leadership, and teamwork abilities. 5. **Compliance training**: ensures that individuals understand and adhere to laws, regulations, and organizational policies. 6. **e-learning**: utilizes digital platforms to deliver training content, allowing for flexibility and accessibility.
Training asset	This is a broad term that encompasses any resource used to support learning and development. A training asset is a resource used to support learning and development. it’s any tool or content designed to help individuals acquire new skills or knowledge and can include any	This can include training materials but also includes tools, technologies and platforms used to deliver or enhance training for example courses, books, interactive simulations, virtual reality environments, exams, mentoring sessions and even the expertise of trainers and mentors.

Term	Definition	Examples and description
	resource that adds value to the training process.	
Training material	This term is more specific and typically refers to the actual content or items used during a training session. Examples include handouts, slides, manuals, and worksheets. Training materials are the tangible items that trainers and learners use directly during the training.	**Didactic**: video recording of an interview to be used in a group session to discuss for example "do's and don'ts" during an interview, a fully described case study, a fully described simulation exercise, a power point, cascading material (i.e., materials used by the trainees to disseminate the knowledge learnt during the training session), etc. **Physical**: post-its, projector, colour markers, etc.
Training event	A training event is a planned and organized activity designed to facilitate learning and development. It typically involves a group of participants and is conducted over a specific period, ranging from a few hours to several days. The primary goal of a training event is to impart knowledge, develop skills, and enhance competencies in a particular area. Training events can take various forms, including workshops, seminars, conferences, and boot camps. They can be conducted in-person, online, or in a hybrid format, depending on the needs and preferences of the participants and organizers.	Key characteristics of a training event include: 1. **Structured agenda**: a clear schedule outlining the topics, activities, and objectives to be covered. 2. **Facilitators or trainers**: experienced individuals who lead the event, provide instruction, and guide participants through the learning process. 3. **Interactive activities**: engaging exercises, discussions, and hands-on practice to reinforce learning and encourage participation. 4. **Learning materials**: resources such as presentations, handouts, and digital content to support the training. **5.** **Assessment and feedback**: methods to evaluate participants' understanding and provide constructive feedback for improvement.

Roles and responsibilities

Profiles	Responsibilities
Project Managers (PM)	They have the overall responsibility of implementation of the framework contract with the contracting authority. They oversee the successful initiation, planning, design, execution, monitoring, controlling and closure of each specific contract. He/she (or his/her temporary substitute) is deemed to react within a working day to any communication made by the contracting authority. and must provide with answers and solutions, both regarding the subject matter of the contract and organisational or administrative matters.
Senior Instructional Designers (SID)	He or she is responsible for developing comprehensive learning solutions by translating subject matter expertise into instructional content. They conduct training needs analyses to identify gaps and create educational programs to address those needs. Additionally, they oversee the design, development, and implementation of training modules, ensuring they are engaging and effective.
Junior instructional Designers (JID)	They design a broad outline of the training courses /activities, search for pedagogical approaches and determine the types of skills or knowledge the learner needs to develop. They create the actual instructional material.
Learning Technologist (LT)	He/she supports the team in identifying appropriate learning technologies. He/she combines expertise in learning technologies and learning design, researches and implements technologies and approaches such as virtual learning environments, online learning, blended learning, flipped classroom, social media for learning, lecture capture, polling, among others.
Audiovisual experts (AVE)	They collaborate with clients and team members to design and implement tailored AV solutions. They are also responsible for setting up and operating AV equipment, such as projectors and sound systems, for events and presentations. Additionally, they maintain and troubleshoot equipment to ensure everything functions properly.
Content matter experts (CME)	They help to define the learning objectives of training activities (where required) and provide feedback on how all training activities are being developed according to their expertise. They are the experts with significant knowledge, skills and experience in public health and infectious diseases.
Lecturers and trainers (LEC)	They are responsible for delivering engaging educational content. They support and guide trainees in the learning process. Additionally, they may participate in curriculum development and development of training material.
Facilitators (FAC)	They facilitate and animate the training event, manage and stimulate discussions and ensure dynamic and interactive communication and collaboration among participants. When required for specific issues, ECDC will support the facilitators. The role of the facilitators should be (among others) to design and plan the group process and select the tools that best help the group progress towards that outcome; guide and control the group process to ensure that there is effective participation.

1.5. Place of performance: where will the contract be performed?

The services will be performed at the following locations:

- the contractor's premises
- face-to-face trainings will be delivered mainly at ECDC premises, alternatively in other EU/EEA cities

The estimated distribution of deliveries among the different locations is as follows:

Location	% of the estimated overall volume of face-to-face trainings
Stockholm (SE)	70%
Other EU/EEA cities	30%

The above are estimates only and entail no commitment for the contracting authority.

1.6. Nature of the contract: how will the contract be implemented?

The procedure will result in the conclusion of a single framework contract.

A framework contract (FWC) establishes a mechanism for future repetitive purchases by the contracting authority to be awarded in the form of specific contracts[1]. The signature of a framework contract does not impose an obligation on the contracting authority to conclude specific contracts with a framework contractor.

The single framework contract will be concluded with one contractor. Specific contracts shall be awarded on the basis of the terms laid down in the framework contract, refined or, in duly justified circumstances, supplemented to reflect the particular circumstances of the specific contract. The details are set out in the draft contract.

Tenderers need to take full account of the full set of procurement documents, including the provisions of the draft contract as the latter will define and govern the contractual relationship to be established between the contracting authority and the successful tenderer. Special attention is to be paid to the provisions specifying the rights and obligations of the contractor, in particular those on payments, performance of the contract, confidentiality, and checks and audits.

☝ Please be aware that if a tenderer to whom the contract is awarded (any of the group members in case of a joint tender) has established debt(s) owed to the Union, the European Atomic Energy Community or an executive agency when the latter implements the Union budget, such debt(s) may be offset, in line with Articles 101(1) and 102 of 2024/2509 of the European Parliament and of the Council of 23 September 2024 on the financial rules applicable to the general budget of the Union

[1] Any reference to specific contracts applies also to order forms (a simplified form of specific contract).

(Financial Regulation)[2] and the conditions set out in the draft contract, against any payment due under the contract. The contracting authority will verify the existence of overdue debts of the successful tenderer (any of the group members in case of a joint tender), and, if any such debt is found, will inform the tenderer (the group leader in case of a joint tender who will then have the obligation to inform all other group members before signing the contract) that the debt(s) may be offset against any payment under due the contract.

1.6.1. Fixed price contracts

The following process relating to Fixed Price contracts applies:

ECDC sends a request for services specifying the deliverables, delivery schedule, place of execution etc. Within the number of working days indicated in the request for the services, the Contractor shall send a specific tender meeting the requirements specified in the request for services and associated annexes, such as the technical specifications, deliverables, and deadlines.

The specific tender must include the technical proposal that has to indicate the proposed activities, project plan, the team structure and list of experts, profiles, roles, responsibilities and workload (man-days) of the different team members.

If the selection of the Content Matter Experts to design, create and/or deliver a training asset based on the topic and requirements as specified in the request for service is needed, the contractor will search and propose up to three CVs as part of the specific tender.

The specific tender must also include the financial proposal in line with the prices specified in the Framework Contract.

All services are included in the price. If the financial proposal is accepted by ECDC, this will be the fixed amount which can be paid under the contract.

1.7. Volume and value of the contract: how much do we plan to buy?

An indicative estimate of the volumes to be ordered over the whole duration of the framework contract is given in the financial model in Annex 6. These volumes are estimates only and there is no commitment as to the exact quantities to be ordered. The actual volumes will depend on the quantities, which the contracting authority will order through specific contracts. In any case, the *framework contract ceiling*, i.e. the maximum amount to be spent under the framework contract, shall not be exceeded.

The *framework contract ceiling* is indicated in Section 5.1.5 of the contract notice.

Within three years following the signature of the framework contract resulting from the current call for tenders, the contracting authority may use the negotiated procedure under point 11.1.e of Annex 1 to the Financial Regulation to procure new services from the contractor up to a maximum of 50 % of the initial *framework contract ceiling*. These services would consist in the repetition of similar services entrusted to the contractor.

[2] Regulation (EU, Euratom) 2024/2509 of the European Parliament and of the Council of 23 September 2024 on the financial rules applicable to the general budget of the Union

1.8. Duration of the contract: how long do we plan to use the contract?

The framework contract resulting from the award of this call for tenders will be concluded for at most 48 months. The details of the initial contract duration and possible renewals are set out in the draft contract.

1.9. Electronic exchange system: can exchanges under the contract be automated?

For all exchanges with the contractor during the implementation of the framework contract as well as for future possible subsequent proceedings, including, but not limited to, for the purposes of EDES (European Union's Early Detection and Exclusion System), the contracting authority may use an electronic exchange system meeting the requirements of Article 151 of the Financial Regulation. At the request of the contracting authority, the use of such a system shall become mandatory for the contractor at no additional cost for the contracting authority. Details on specifications, access, terms and conditions of use will be provided in advance.

1.10. Security

When performing tasks for the contracting authority in execution of the contract, the contractor and its personnel shall comply with the contracting authority's applicable security requirements. For ECDC, the applicable security requirements include:

- Compliance to the ISO 27001 standard on Information Security or similar;
- Implementation of a security classification schema, *which is as a minimum compliant to:*

✓ ECDC's Information Security, Cybersecurity and Information Classification Policies are based on the ISO 27001 standard and on the following Commission Decisions:

  - Commission Decision (EU, Euratom) 2017/46 of 10 January 2017 on the security of communication and information systems in the European Commission, its subsequent versions, its implementing rules (as adapted from time to time) and the corresponding security standards, guidelines and notices;
  - Commission Decision (EU, Euratom) 2015/444 of 13 March 2015 on the security rules for protecting EU classified information, its subsequent versions, its implementing rules (as adapted from time to time) and the corresponding security standards, guidelines and notices;
  - Commission Decision (EU, Euratom) 2015/443 of 13 March 2015 on Security in the Commission, as well as all its subsequent versions;

Any financial burden for complying with the security measures (e.g. security background checks, security clearance etc.) will be entirely at the expense of the contractor and not of the contracting authority.

The contracting authority reserves the right to require any person involved in the provision of the services under a given project to attend security briefings or training given by the contracting authority.

In exceptional cases, when required for security reasons, the contracting authority may ask the contractor to provide security vetted personnel for the provision of certain services. A positive outcome of the national vetting process leads to the status "security clearance". This will be considered as a specific requirement for a specific project, without influencing the other conditions.

Should the contractor, during the performance of the tasks, which are the subject of the contract, need remote access to any communication and information system of ECDC or data sets processed therein, one of the two following approaches should be observed:

1) Contractor’s personnel is granted remote access to any communication and information system of the ECDC or data sets processed therein, without being provided with ECDC’s IT equipment. In this case the Contractor shall be requested to comply with ECDC’s Information Security Policy and Rules.

   During the authorisation process the contractor is asked to describe relevant organisational, physical, logical and network security measures in order to provide reasonable assurance that the risks are adequately and systematically covered. No remote access will be possible in this context without having in place an approved Security Agreement.

   Contractors and service providers may be required to comply with the baseline security measures.

2) Contractor's personnel use ECDC’s IT equipment (normally a laptop or Virtual Desktop) and connects ECDC’s internal network via the remote access service for ECDC staff, must sign an Acceptable Use of IT Equipment agreement.

2. GENERAL INFORMATION ON TENDERING

2.1. Legal basis: what are the rules?

This call for tenders is governed by the provisions of the Financial Regulation.

The contracting authority has chosen to award the contract resulting from this call for tenders through an open procedure pursuant to Article 167(1)(a) of the Financial Regulation.

In this procedure any interested economic operator (any natural or legal person who offers to supply products, provide services or execute works) may submit a tender.

2.2. Entities subject to restrictive measures and rules on access to procurement: who may submit a tender?

Tenderers must ensure that no involved entities (see Section 2.4) nor any subcontractors, including those which do not need to be identified in the tender (see Section 2.4.2), are subject to EU restrictive measures adopted under Article 29 of the Treaty on the European Union (TEU) or Article 215 of the Treaty on the Functioning of the EU (TFEU)[3], consisting of a prohibition to make available or transfer funds or economic resources or to provide financing or financial assistance to them directly or indirectly, or of an asset freeze. The prohibition applies throughout the whole performance of the contract.

Participation in this call for tenders is open on equal terms to all natural and legal persons coming within the scope of the Treaties, as well as to international organisations.

It is also open to all natural and legal persons established in a third country provided that it has a special agreement with the European Union in the field of public procurement (i.e. the European Economic Area and Stabilisation and Association Agreement countries) on the conditions laid down in that agreement.

The Agreement on Government Procurement[4] concluded within the World Trade Organisation does not apply. Therefore, the participation to this call for tenders is not open to natural and legal persons established in the countries that have ratified this Agreement.

The rules on access to procurement do not apply to entities on whose capacity tenderers rely to fulfil the selection criteria nor to subcontractors. Subcontracting may not be used with the intent or effect to circumvent the rules on access to procurement.

To enable the contracting authority to verify the access, each tenderer must indicate its country of establishment (in case of a joint tender – the country of establishment of each group member) and must present the supporting evidence normally acceptable under the law of that country. The same document(s) could be used to prove country/-ies of establishment and the delegation(s) of the authorisation to sign, as described in Section 4.3.

2.3. Registration in the Participant Register: why register?

[3] Please note that the EU Official Journal contains the official list and, in case of conflict, its content prevails over that of the EU Sanctions Map.

[4] https://www.wto.org/english/tratop_E/gproc_e/gp_gpa_e.htm

Any economic operator willing to participate in this call for tenders must be registered in the Participant Register - an online register of organisations and natural persons (participants) participating in calls for tenders or proposals of the European Commission and other EU institutions/bodies.

On registering each participant obtains a Participant Identification Code (PIC, 9-digit number), which acts as its unique identifier in the Participant Register. A participant needs to register only once – the information provided can be further updated or re-used by the participant in other calls for tenders or calls for proposals of the European Commission and other EU institutions/bodies.

☝ **Each participant needs to ensure that its SME status in the Participant Register is registered and kept up to date.**

In addition economic operators must provide a duly filled in and signed Legal Entity Form and Financial Identification Form (see links under Annexes) accompanied by the supporting documents requested therein. Where the tenderer has already signed another contract with ECDC, they may provide instead a copy, unless changes occurred in the meantime.

2.4. Ways to submit a tender: how can economic operators organise themselves to submit a tender?

Economic operators can submit a tender, either as a sole economic operator (sole tenderer) or as a group of economic operators (joint tender)[5]. In either case subcontracting is permitted.

Tenders must be drawn and submitted in complete independence and autonomously from the other tenders. A declaration in this regard by each tenderer (in case of a joint tender, by the group leader) shall be requested ***(Annex 2)***.

A natural or legal person cannot participate at the same time and within the same procedure either as member of two or more groups of economic operators or as a sole tenderer and member of another group of economic operators. In such case, all tenders in which that person has participated, either as sole tenderer or as member of a group of economic operators, will be rejected.

Economic operators linked by a relationship of control or of association (e.g. belonging to the same economic/corporate group) are allowed to submit different and separate tenders, provided that each tenderer is able to demonstrate that its tender was drawn independently and autonomously.

A natural or legal person may act as subcontractor for several tenderers as long as the tenders are drawn and submitted in complete independence and autonomously from each other. However, cross subcontracting among tenderers is forbidden, more precisely an entity "A" may participate as tenderer (either as sole tenderer or as member of a group of economic operators) and as subcontractor to another tenderer "B" within the same procurement procedure. However, in this case it is forbidden that tenderer "B" (or any of its participating members in case of a group of economic operators) is at the same time subcontractor for tenderer "A" (or for the group of economic operators in which "A" participates) within the same procurement procedure. In this case, both tenders A and B shall be rejected.

In order to fulfil the selection criteria, set out in Section 3.2 the tenderer can rely on the capacities of subcontractors (see Section 2.4.2) or other entities that are not subcontractors (see Section 2.4.3).

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[5] Each economic operator participating in the joint tender is referred to as "group member".

An **“involved entity”** is any economic operator involved in the tender. This includes the following four categories of economic operators:

- sole tenderer,
- group members (including group leader),
- identified subcontractors (see Section 2.4.2), and
- other entities (that are not subcontractors) on whose capacity the tenderer relies to fulfil the selection criteria.

The role of each entity involved in a tender must be clearly specified in the eSubmission application: i) sole tenderer, ii) group leader (in case of a joint tender), iii) group member (in case of a joint tender), or iv) subcontractor[6].

For an entity on whose capacities the tenderer relies to fulfil the selection criteria (that is not a subcontractor), this role is defined in the commitment letter (***Annex 5.2***)

2.4.1. Joint tenders

A joint tender is a situation where a tender is submitted by a group (with or without legal form) of economic operators regardless of the link they have between them in the group. The group as a whole is considered a tenderer[7].

All group members assume joint and several liability towards the contracting authority for the performance of the contract as a whole.

Group members must appoint from among themselves a group leader (the group leader) as a single point of contact authorised to act on their behalf in connection with the submission of the tender and all relevant questions, clarification requests, notifications, etc., that may be received during the evaluation, award and until the contract signature. All group members (including the group leader) must sign an Agreement/Power of attorney drawn up in the model attached in **Annex 3**.

The joint tender must clearly indicate the role and tasks of each group member, including those of the group leader who will act as the contracting authority's contact point for the contract's administrative or financial aspects and operational management. The group leader will have full authority to bind the group and each of its members during contract execution.

If the joint tender is successful, the contracting authority shall sign the contract with the group leader, authorised by the other members to sign the contract also on their behalf via the Agreement/Power of attorney drawn up in the model attached in ***Annex 3***.

Changes in the composition of the group during the procurement procedure (after the deadline for submission of tenders and before contract signature) shall lead to rejection of the tender, with the exception of the following case[s]:

- case of a merger or takeover of a group member (universal succession), provided that the following cumulative conditions are fulfilled:

  - the new entity is not subject to restrictive measures, has access to procurement (see Section

[6] Only identified subcontractors (see Section 2.4.2) must be specified in the eSubmission application.

[7] References to *tenderer* or *tenderers* in this document shall be understood as covering both sole tenderers and groups of economic operators submitting a joint tender.

2.2) and is not in an exclusion situation (see Section 3.1),
- all the tasks assigned to the former entity are taken over by the new entity member of the group,
- the group meets the selection criteria (see Section 3.2),
- the change must not make the tender non-compliant with the procurement documents,
- the terms of the originally submitted tender are not altered substantially and the evaluation of award criteria of the originally submitted tender are not modified,
- the new entity undertakes to replace the former entity for the implementation of the contract, in case of an award.

2.4.2. Subcontracting

Subcontracting is the situation where the contractor enters into legal commitments with other economic operators, which will perform part of the contract on its behalf. The contractor retains full liability towards the contracting authority for performance of the contract as a whole.

The following shall not be considered subcontracting:

a) Use of workers posted to the contractor by another company owned by the same group and established in a Member State ("intra-group posting" as defined by Article 1, 3, (b) of Directive 96/71/EC concerning the posting of workers in the framework of the provision of services).
b) Use of workers hired out to the contractor by a temporary employment undertaking or placement agency established in a Member State ("hiring out of workers" as defined by Article 1, 3, (c) of Directive 96/71/EC concerning the posting of workers in the framework of the provision of services).
c) Use of workers temporarily transferred to the contractor from an undertaking established outside the territory of a Member State and that belongs to the same group ("intra-corporate transfer" as defined by Article 3, (b) of Directive 2014/66/EU on the conditions of entry and residence of third-country nationals in the framework of an intra-corporate transfer).
d) Use of staff without employment contract ("self-employed persons working for the contractor"), without the tasks of the self-employed persons being particular well-defined parts of the contract.
e) Use of suppliers and/or transporters by the contractor, in order to perform the contract at the place of performance, unless the economic activities of the suppliers and/or the transporting services are within the subject of this call for tenders (see Section 1.4).
f) Performance of part of the contract by members of an EEIG (European Economic Interest Grouping), when the EEIG is itself a contractor or a group member.

The persons mentioned in points a), b), c) and d) above will be considered as "personnel" of the contractor as defined in the contract.

All contractual tasks may be subcontracted unless the procurement documents expressly reserve the execution of certain critical tasks to the sole tenderer itself, or in case of a joint tender, to a group member.

By filling in the form available in ***Annex 4*** (List of identified subcontractors), tenderers are required to give an indication of the proportion of the contract that they intend to subcontract, as well as to identify and describe briefly the envisaged contractual roles/tasks of subcontractors meeting any of these conditions (hereafter referred to as *identified subcontractors*):

- subcontractors on whose capacities the tenderer relies upon to fulfil the selection criteria as described under Section 3.2;

- subcontractors whose intended individual share of the contract, known at the time of submission, is above 15 %.

Any such subcontractor must provide the tenderer with a commitment letter drawn up in the model attached in ***Annex 5.1*** and signed by its authorised representative.

☝ Each tenderer shall identify such subcontractors and provide the commitment letters with its tender. The information must be true and correct at the time of submitting the tender. Any changes or additions regarding the envisaged subcontractors after the deadline for submission of tenders must be justified to the contracting authority.

The above rules apply also where the economic operators, which will perform part of the contract on behalf of a successful tenderer, belong to the same economic/corporate group as the sole tenderer or a member of the group submitting the joint tender.

Changes concerning subcontractors identified in the tender (withdrawal/replacement of a subcontractor, additional subcontracting) during the procurement procedure (after the deadline for submission of tenders and before contract signature) require the prior written approval of the contracting authority subject to the following verifications:

- any new subcontractor is not subject to restrictive measures, has access to procurement if the rules on access to procurement apply also to subcontractors (see Section 2.2) and is not in an exclusion situation (see Section 3.1),
- the tenderer still fulfils the selection criteria and the new subcontractor fulfils the selection criteria applicable to it individually, if any;
- the terms of the originally submitted tender are not altered substantially, i.e. all the tasks assigned to the former subcontractor are taken over by another involved entity, the change does not make the tender non-compliant with the tender specifications, and the evaluation of award criteria of the originally submitted tender is not modified.

Subcontracting to subcontractors identified in a tender that was accepted by the contracting authority and resulted in a signed contract, is considered authorised.

2.4.3. Entities (not subcontractors) on whose capacities the tenderer relies to fulfil the selection criteria

In order to fulfil the selection criteria a tenderer may also rely on the capacities of other entities (that are not subcontractors), regardless of the legal nature of the links it has with them. It must in that case prove that it will have at its disposal the resources necessary for the performance of the contract by producing a commitment letter in the model attached in ***Annex 5.2***, signed by the authorised representative of such an entity, and the supporting evidence that those other entities have the respective resources[8].

☝ The above rules apply also where the economic operators on whose capacities the tenderer relies to fulfil the selection criteria (that are not subcontractors) belong to the same economic/corporate group as the sole tenderer or a member of the group submitting the joint tender.

[8] This does not apply to subcontractors on whose capacity the tenderer relies to fulfil the selection criteria – for these the documentation required for subcontractors must be provided.

2.4.4. Rules common to subcontractors and entities (not subcontractors) on whose capacities the tenderer relies to fulfil the selection criteria

If a successful tenderer intends to rely on another entity to meet the minimum levels of economic and financial capacity, the contracting authority may require the entity to sign the contract or, alternatively, to provide a joint and several first-call financial guarantee for the performance of the contract.

With regard to technical and professional selection criteria, a tenderer may only rely on the capacities of other entities where the latter will perform the works or services for which these capacities are required, i.e. the latter will either assume the role of subcontractors or will fall within the exceptions listed in Section 2.4.2 and will then assume the role of entities (not subcontractors) on whose capacities the tenderer relies to fulfil the selection criteria.

☝ Relying on the capacities of other entities is only necessary when the capacity of the tenderer is not sufficient to fulfil the required minimum levels of capacity. Abstract commitments that other entities will put resources at the disposal of the tenderer will be disregarded.

3. EVALUATION AND AWARD

The evaluation of the tenders that comply with the submission conditions will consist of the following elements:

- Check if the tenderer is not subject to restrictive measures and has access to procurement (see Section 2.2);
- Verification of administrative compliance (if the tender is drawn up in one of the official EU languages and the required documents signed by duly authorised representative(s) of the tenderer);
- Verification of non-exclusion of tenderers on the basis of the exclusion criteria;
- Selection of tenderers on the basis of selection criteria;
- Verification of compliance with the minimum requirements specified in the procurement documents;
- Evaluation of tenders on the basis of the award criteria.

The contracting authority will evaluate the above mentioned elements in the order that it considers to be the most appropriate.

If the evaluation of one or more elements demonstrates that there are grounds for rejection, the tender will be rejected and will not be subjected to further full evaluation. The unsuccessful tenderers will be informed of the ground for rejection without being given feedback on the non-assessed content of their tenders. Only the tenderer for whom the verification of all elements did not reveal grounds for rejection can be awarded the contract resulting from this call for tenders.

The evaluation will be based on the information and evidence contained in the tenders and, if applicable, on additional information and evidence provided at the request of the contracting authority during the procedure. If any of the declarations or information provided proves to be false, the contracting authority may impose administrative sanctions (exclusion or financial penalties) on the entity providing the false declarations/information.

For the purposes of the evaluation related to exclusion and selection criteria the contracting authority may also refer to publicly available information, in particular evidence that it can access on a national database free of charge.

3.1. Exclusion criteria

The objective of the exclusion criteria is to assess whether the tenderer is in any of the exclusion situations listed in Article 136(1) of the Financial Regulation.

Tenderers found to be in an exclusion situation will be rejected.

As evidence of non-exclusion, each tenderer[9] needs to submit with its tender a Declaration on Honour[10] in the model available in ***Annex 2***.[11] The declaration must be signed by an authorised representative of the entity providing the declaration. Where the declaration has been signed by hand,

[9] See Annex 1 which of the involved entities participating in a tender need to provide the Declaration on Honour.

[10] The European Single Procurement Document (ESPD) may not be used yet in calls for tenders of the European Centre for Disease Prevention and Control.

[11] Unless the same declaration has already been submitted for the purposes of another award procedure of the European Centre for Disease Prevention and Control, the situation has not changed, and the time elapsed since the issuing date of the declaration does not exceed one year.

the original does not need to be submitted to the contracting authority, but the latter reserves the right to request it from the tenderer at any time during the record-keeping period specified in Section 4.3.

The initial verification of non-exclusion of tenderers will be done on the basis of the submitted declarations and consultation of the European Union's Early Detection and Exclusion System.

At any time during the procurement procedure[13], the contracting authority may request the documents mentioned in the Declaration on Honour as supporting evidence on non-exclusion (the documentary evidence). It may also request information on natural or legal persons that are members of the administrative, management or supervisory body or that have powers of representation, decision or control, including legal and natural persons within the ownership and control structure and beneficial owners, and appropriate evidence that none of those persons are in one of the exclusion situations referred to in Section A point (1) (c) to (f) of the Declaration on Honour.

All tenderers are **invited to prepare in advance the documentary evidence**, since they may be requested to provide such evidence within a short deadline. In any event, the tenderer proposed by the evaluation committee for the award of the contract will be requested to provide such evidence.

☝ If the tenderer does not provide valid documentary evidence within the deadlines set by the contracting authority, the latter reserves the right to reject the tender. In any event, in case a tenderer proposed for the award of the contract fails to comply with the above evidence requirement, its tender will be rejected, unless the tenderer can justify the failure on the grounds of material impossibility to provide such evidence.

Annex 1 specifies which of the involved entities participating in a tender need to provide the Declaration on Honour and, when requested by the contracting authority, the supporting evidence.

Please note that a request for evidence in no way implies that the tenderer has been successful.

3.2. Selection criteria

The objective of the selection criteria is to assess whether the tenderer has the legal, regulatory, economic, financial, technical and professional capacity to perform the contract.

The selection criteria for this call for tenders, including the minimum levels of capacity, the basis for assessment and the evidence required, are specified in the following subsections.

Tenders submitted by tenderers not meeting the minimum levels of capacity will be rejected.

When submitting its tender each tenderer shall declare on honour that it fulfils the selection criteria for this call for tenders. The model Declaration on Honour available in ***Annex 2*** shall be used.

The initial assessment of whether a tenderer fulfils the selection criteria will be done on the basis of the submitted declaration(s).

[13] The obligation to provide the supporting evidence will be waived in the following situations:

- if the same documents have already been provided in a previous award procedure of the European Centre for Disease Prevention and Control, have been issued no more than one year before the date of their request by the contracting authority and are still valid at that date;
- if such evidence can be accessed by the contracting authority on a national database free of charge, in which case the economic operator shall provide the contracting authority with the internet address of the database and, if needed, the necessary identification data to retrieve the document;
- if there is a material impossibility to provide such evidence.

The subsections below specify which selection criteria evidence must be provided with the tender or may be requested later, at any time during the procurement procedure, within a deadline given by the contracting authority[14].

The evidence must be provided in accordance with the applicable basis for assessment of each criterion: in case of a consolidated assessment – only by the involved entities who contribute to the fulfilment of the criterion, and in case of individual assessment – by each entity to whom the criterion applies individually.

In case not all selection criteria evidence is requested with the tender, all tenderers are **invited to prepare in advance the documentary evidence**, since they may be requested to provide such evidence within a short deadline. In any event, the tenderer proposed by the evaluation committee for the award of the contract will be requested to provide such evidence.

☝ If the tenderer does not provide valid documentary evidence within the deadlines set by the contracting authority, the contracting authority reserves the right to reject the tender. In any event, in case a tenderer proposed for the award of the contract fails to comply with the above evidence requirement, its tender will be rejected, unless there is a ground for a waiver.

Please note that a request for evidence in no way implies that the tenderer has been successful.

3.2.1. Legal and regulatory capacity

Tenderers can be natural or legal persons. Tenderers are not obliged to take a specific legal form in order to submit their tenders.

Where tenderers submit a tender through an entity, which lacks legal personality (e.g., a branch), the compliance with the exclusion criteria, selection criteria, the rules on access to procurement as well as the absence of restrictive measures shall be assessed at the level of the tenderers.

Tenderers (including each member of the group in case of joint tender) must prove that they have legal capacity to perform the contract and the regulatory capacity to pursue the professional activity necessary to carry out the work subject to this call for tenders.

- For legal persons, if it has not been provided with the Legal Entity Form, a legible copy of the notice of appointment of the persons authorised to represent the tenderer in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation applicable to the legal person requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.

- For natural persons, if required under applicable law, a proof of registration on a professional or trade register or any other official document showing the registration number.

In addition, involved entities (see Section 2.4) and all subcontractors, including those which do not need to be identified in the tender (see Section 2.4.2), must not be subject to EU restrictive measures

[14] The obligation to provide the supporting evidence will be waived in the following situations:
- if the same documents have already been provided in a previous award procedure of the European Centre for Disease Prevention and Control and are still up-to-date;
- if such evidence can be accessed by the contracting authority on a national database free of charge, in which case the economic operator shall provide the contracting authority with the internet address of the database and, if needed, the necessary identification data to retrieve the document.

adopted under Article 29 of the Treaty on the European Union (TEU) or Article 215 of the Treaty on the Functioning of the EU (TFEU)[15] that constitute a legal impediment to perform the contract. This requirement will be assessed by reference to the EU restrictive measures in force. Therefore, the tenderer is not required to submit any evidence of not being subject to EU restrictive measures.

3.2.2. Economic and financial capacity

Tenderers must comply with the following selection criteria in order to prove that they have the necessary economic and financial capacity to perform the contract.

Criterion F1	
Minimum level of capacity	Average yearly turnover of the last two financial years above EUR 2,000,000.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. a consolidated assessment of the combined capacities of all involved entities will be carried out.
Evidence	1) Duly completed and signed Simplified Financial Statement (see Annexes), and 2) the following depending on the legal form. For Profit Organisations (whose primary goal is making a profit): • copy of the profit & loss account and balance sheet for the last two years for which accounts have been closed. For non-Profit Organisations (formed for the purpose of serving a public or mutual benefit other than the pursuit or accumulation of profits for owners or investors): • copy of the statement of financial activities and statement of the financial position for the last two years for which accounts have been closed. For Public sector entities (including public universities and international organizations), which according to the law of the country in which they are established are NOT required to publish balance sheets: • extracts from their last two budgets (including the current one) as evidence of their average budget amounting to at least the value indicated above (under "Criteria"). For Individuals: • extracts from any available documents (e.g. income tax returns) as evidence on their average income for the last two financial years amounting to at least the value indicated above (under "Criteria"). If, for some exceptional reason which ECDC considers justified, a tenderer is unable to provide one or other of the above documents, it may prove its economic and financial capacity by any other document which ECDC considers

[15] Please note that the EU Official Journal contains the official list and, in case of conflict, its content prevails over that of the EU Sanctions Map.

Criterion F1	
	appropriate. In any case, ECDC must at least be notified of the exceptional reason and its justification. ECDC reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity. The most recent year must have been closed within the last 18 months.

☝ All of the above-specified evidence of economic and financial capacity must be provided with the tender.

3.2.3. Technical and professional capacity

☝ With regard to technical and professional selection criteria, a tenderer may only rely on the capacities of other entities where the latter will perform the works or services for which these capacities are required. The entity on whose capacity the tenderer relies will either assume the role of a subcontractor or fall within the exceptions listed in Section 2.4.2.

Tenderers must comply with the following selection criteria in order to prove that they have the necessary technical and professional capacity to perform the contract:

Criterion T1	
The tenderer must prove experience in the field of development of e-learnings, including production of animated clips, graphics and creation of video material	
Minimum level of capacity	At least three similar (in scope and complexity) projects ongoing or completed in the last three years preceding the tender submission deadline, with a minimum value for each of them € 60.000.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out.
Evidence	1) A list of projects meeting the minimum level of capacity. The list shall include the scope and description of the project, including start and end date, total project amount, client, etc. Three screenshots[1] from at least one of the final visual products must be provided. 2) As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.

[1] Only providing links to web pages are not sufficient and will be rejected.

Criterion T2	
The tenderer must prove experience in developing, organising and delivering online and in-person trainings (including logistic arrangements) in infections disease prevention and control for a multicultural audience working in Public Health	
Minimum level of capacity	At least: - five on-line trainings - five in-persons trainings (including logistic arrangements) for a group of minimum 30 people with a minimum value of EUR 100,000 each - five webinars (similar in scope and complexity), completed in the past five years.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out.
Evidence	1) A list of projects meeting the minimum level of capacity. The list shall include the scope of the project, start and end date, target audience, number of participants, total project amount, client. 2) As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.

Criterion T3	
The tenderer must prove capacity to draft reports in English (C1 equivalent[2])	
Minimum level of capacity	At least 3 projects completed in the last three years preceding the tender submission deadline showing the necessary language coverage.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out.
Evidence	3 documents of at least 10 pages (report, study, etc.) meeting the minimum level of capacity published or delivered to a client in the last three years preceding the tender submission deadline.

[2] Common European Framework of Reference for Languages: Learning, Teaching, Assessment (http://www.coe.int/lang-cefr)

<table>
<tr><th colspan="2">Criterion T4</th></tr>
<tr><td colspan="2">The tenderer must prove to dispose of the necessary human resources to perform the contract in line with best professional practice.

Tenderers should demonstrate to have enough staff to manage the contract and perform the overhead operations related to the requested services, including the capacity to carry out requests placed by several ordering services simultaneously and within short timeframes.</td></tr>
<tr><td>Minimum level of capacity</td><td>The tenderer should demonstrate that it has at its disposal a team of 21 persons, consisting of employees and/or contractual staff, with the following profiles:

• At least 2 Project Managers (PM) with the relevant university degree (either 5 completed years of university or Master' degree) and at least 5 years professional experience in managing simultaneous projects in the field of training and experience in projects of similar scope as well as experience in managing teams of at least five people.

• At least 2 Senior Instructional Designers (SID) with the relevant university degree (either 5 completed years of university or Master' degree) and at least 5 years of experience in designing and development of curriculum, instructional material for participants and trainers, lead assessments and design evaluations.

• At least 2 Junior Instructional Designers (JID) with at least 3 years of experience in designing instructional material for participants and building presentations to be used in courses.

• At least 1 Learning Technologist (LT) with at least 3 years of experience in design of e-learning resources.

• At least 2 Audiovisual Experts (AVE) with 3 years of experience in video production for educational purposes including shooting live presentations, recording streaming video, editing of video.

• At least 3 Content Matter Experts (CME) in public health applied infectious disease with the relevant university degree (either 5 completed years of university or Master' degree) and at least 5 years professional experience in development and delivery of trainings in public health applied to infectious disease in the EU/EEA.
NB: The experts must not have any scientific conflict of interest e.g. through private sector funding.</td></tr>
</table>

Criterion T4	
	• **At least 5 Lecturers and Trainers (LEC)**, with the relevant university degree (either 5 completed years of university or Master' degree), at least 5 years of professional experience in adult training in infectious disease prevention and control in the EU. They must have experience in training international audiences. *NB: The lecturers and trainers must not have any scientific conflict of interest e.g. through private sector funding.* • **At least 2 Facilitators (FAC)** with at least 4 years of professional experience in facilitating training events for adult learners in the area of public health. They must have experience in training international audiences. • **At least 2 event administrative assistants (EAA)** with 4 years of experience in the organisation of *training* events including logistics and participants management. *- All members of the team should have at least C1 level in the Common European Framework for Reference for Languages in English.*
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out.
Evidence	As evidence tenderers shall provide 1) proof of educational qualifications and professional experience of those persons who will provide the services for this tender (CVs with Europass format). The CVs provided shall indicate the **function/profile of each person and highlight relevant information** (e.g. required number of years of the relevant experience, projects). 2) a language certificate or details of past experience in English such as working in an English-speaking environment, appropriate level of studies or English as mother tongue. 3) Annual declaration of interest of CME's, Lecturers and Trainers (see Annexes).

☝ All of the above-specified evidence of technical and professional capacity must be provided with the tender.

***

☝ Involved entities (see Section 2.4) and all subcontractors, including those which do not need to be identified in the tender (see Section 2.4.2), must not be subject to professional conflicting interests which may negatively affect the contract performance. Where the contracting authority has established such conflicting interests, it may conclude that the tenderer or an involved entity does not possess the required professional capacity to perform the contract to an appropriate quality standard.

The presence of conflicting interests shall be examined during the evaluation phase based on the statements made through the Declarations on Honour and, where applicable, the commitment letters (***Annex 5.1 and Annex 5.2***).

The presence of conflicting interests shall be examined also on the basis of the submitted requested Annual Declarations" (see Annexes).

When evaluating the tenders submitted in the present procedure for the award of framework contract, the contracting authority may consider the risk of professional conflicting interests with reference to the nature and subject of the specific contracts under the framework contract.

Further details and obligations concerning professional conflicting interests are set out in the draft contract.

3.3. Compliance with the conditions for participation and minimum requirements specified in the procurement documents

By submitting a tender a tenderer commits to perform the contract in full compliance with the terms and conditions of the procurement documents for this call for tenders. Particular attention is drawn to the minimum requirements specified in [Section 1.4 of these specifications][the Technical specifications document (Tender specifications – part 2)] and to the fact that tenders must comply with applicable data protection, environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU.

The minimum requirements shall be observed throughout the entire duration of the contract. Compliance with these requirements is mandatory and cannot be subject to any assumptions, limitations, conditions, or reservations on the part of a tenderer.

Tenderers must declare when submitting their tenders in eSubmission whether their tenders comply with the minimum requirements specified in the procurement documents.

☝ **Tenders that are not compliant with the applicable minimum requirements shall be rejected.**

3.4. Award criteria

The objective of the award criteria is to evaluate the tenders with a view to choosing the most economically advantageous tender.

Tenders will be evaluated on the basis of the following award criteria and their weighting:

1. Price - 30 %

The price considered for evaluation will be the total price of the tender, covering all the requirements set out in the tender specifications.

2. Quality - 70 %

The quality of the tender will be evaluated based on the following criteria:

Criterion	**Description**	**Maximum points**	**Minimum points (60%)**
1. Quality of the proposed methodology	Quality and appropriateness of the proposed methods to cover all the required training activities. **Sub-criterion 1.1. Methodology related to all activities** This criterion assesses the suitability and strength of the methodology as measured against the requirements of the specification in terms of the technical content, completeness, efficiency and effectiveness of the approach and methods (didactic approach and learning methods), originality of ideas (where appropriate) and proposed effort **(20 points)**. **Sub-criterion 1.2. Methodology related to case study 1 - Development of a storyboard and a curriculum for case study 1**: a *storyboard* that could be used subsequently for an e-learning module of 10 minutes on an introduction to infectious disease surveillance. The aim is to assess the coherence and relevance of the proposed approach, the level of expertise in the field, the drafting capacity and experience of the proposed team (**20 points)** **Sub criterion 1.3 Methodology related to Case study 2 - Development of a curriculum for case study 2.** A *curriculum* that could be used subsequently for a 3-day face to face introductory training to collaborative approaches for implementation of One Health. The aim is to assess the coherence and relevance of the proposed approach, the training strategy for strengthening cross-sectoral collaboration, the level of expertise in the field of One Health, the drafting capacity and experience of the proposed training team (**20 points).**	60	36

Criterion	Description	Maximum points	Minimum points (60%)
2. Organisation of the work and resources	1. **Relevance and appropriateness of the roles and responsibilities** of the proposed team and of the different economic operators (in case of joint tenders, including subcontractors if applicable) and how they are distributed for each task. It also assesses the global allocation of time and resources to the project and to each task or deliverable, and whether this allocation is adequate for the work **(20 points).** 2. **Approach to the selection of content matter experts, trainers and facilitators**. This sub-criterion assesses the selection process of the experts with relevant expertise and practical experience and validation mechanism of their academic background, publications, professional experience and project involvements. It also assesses the strategy to ensure the availability of the experts **(10 points).**	30	18
3. Quality control plan	This criterion will assess the quality control system applied to the service foreseen in this tender specification concerning the quality of the deliverables, the management of complaints from training participants and corrective actions, the language quality check, and continuity of the service in case of absence of the member of the team. A generic quality system will result in a low score **(10 points).**	10	6
TOTAL QUALITY SCORE		100	70

Tenders must score minimum 60% for each criterion and sub-criterion, and minimum 70% in total. Tenders that do not reach the minimum quality levels will be rejected and will not be ranked.

3.5. Award (ranking of tenders)

Tenders shall be ranked according to the best price-quality ratio in accordance with the formula below:

score for tender X	=	cheapest price* / price of tender X	*	100	*	0.3	+	total quality score (out of 100) for all award criteria of tender X	*	0.7

"Price of tender X" is the "Reference price" in the Financial tender (see. Annexes**).**

Remarks:

Tenderers' attention is drawn to the fact that ECDC will be in a position to make a proper assessment of the tenders on the basis of the above qualitative criteria only if they contain full particulars relating to all aspects of this specification. Lack of detail and vague and perfunctory information will be penalised.

As the tenders will be evaluated on the basis of the quality of the services proposed, they should fully explore all the points included in this specification so as to obtain the best possible mark.

Simply repeating the guidelines given in the specification of this invitation to tender without going into detail or expanding on them will result in a very poor mark.

Furthermore, if any essential points of this specification are not expressly covered by the tender, ECDC may decide to give a zero mark for the relevant quality award criteria.

Should the outcome of the formula lead to two or more tenders with the same result, the tenders with lower price will be ranked higher than the tenders with higher price.

☝ The contract shall be awarded to the tender ranked first, which complies with the minimum requirements specified in the procurement documents and is submitted by a tenderer not subject to restrictive measures, having access to procurement, not in an exclusion situation and fulfilling the selection criteria.

☝ **Detection of abnormally low tenders**

Tenderers must be aware of Point 23 of Annex I to the Financial Regulation on abnormally low tenders and of the possibility for rejection of the tender based on it.

4. FORM AND CONTENT OF THE TENDER

4.1. Form of the tender: how to submit the tender?

Tenders are to be submitted via the eSubmission application according to the instructions laid down in the Invitation letter and the eSubmission Quick Guide available at the link below:

https://wikis.ec.europa.eu/display/FTPortal/Open+procedures_EN

☝ Make sure you prepare and submit your tender in eSubmission early enough to ensure it is received within the deadline for receipt indicated under Section 5.1.12 of the contract notice and/or on Funding & Tenders Portal (F&T Portal)[16].

4.2. Content of the tender: what documents to submit with the tender?

The documents to be submitted with the tender in eSubmission are listed in ***Annex 1***.

The following requirements apply to the technical and financial tender to be uploaded in eSubmission:

- *Technical tender*

The technical tender must provide all the information needed to assess the compliance with Section 1.4 of these specifications and the award criteria. Tenders deviating from the minimum requirements or not covering all the requirements may be rejected on the basis of non-compliance and not evaluated further.

Tenderers are free to choose where the personal data will be processed or stored as long as they comply with the contractual obligations on data processing (Art.I.8.2 and Art. II.9) and, in particular, with the requirements for transfer of personal data to third countries and international organisations laid down in Chapter V of Regulation (EU) 2018/1725[17] and in Chapter V of Regulation (EU) 2016/679.

- *Financial tender.*

A complete financial tender, including the breakdown of the price, needs to be submitted. For this purpose, the Financial Model in **Annex 6** shall be used.

The financial tender shall be:

- expressed in euros. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to bear the risks or the benefits deriving from any variation.
- quoted free of all duties, taxes and other charges, i.e. also free of VAT.

☝ The European Union Institutions are exempt from such charges in the EU under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union of 8 April 1965 annexed to

[16] https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home

[17] Regulation (EU) 2018/1725 of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data, and repealing Regulation (EC) No 45/2001 and Decision No 1247/2002/EC, OJ L 295/39, 21.11.2018

the Treaty on the Functioning of the European Union. Exemption is granted to the Commission by the governments of the Member States, either through refunds upon presentation of documentary evidence or by direct exemption.

In case of doubt about the applicable VAT system, it is the tenderer's responsibility to contact its national authorities to clarify the way in which the European Union is exempt from VAT.

4.3. Signature policy: how can documents be signed?

Where a document needs to be signed, the signature must be either hand-written or, preferably, a qualified electronic signature (QES) as defined in Regulation (EU) No 910/2014 on electronic identification and trust services for electronic transactions in the internal market (the *eIDAS Regulation*).

Tenderers are strongly encouraged to sign with a QES[18] all documents requiring a signature and only exceptionally to sign such documents by hand as hand-written signatures lead to an additional administrative burden for both the tenderer and the contracting authority. The originals of any hand-signed documents (other than the contract) do not need to be submitted to the contracting authority but the tenderer must keep them for a period of five years starting from the notification of the outcome of the procedure or, where the tenderer has been awarded a contract resulting from this call for tenders and the contract has been signed, the payment of the balance.

All documents must be signed by the signatories (when they are individuals) or by their duly authorised representatives.

For the following documents, when signed by representatives, tenderers must provide evidence for the delegation of the authorisation to sign:

- The Declaration on Honour of the tenderer (in case of a joint tender – the Declarations on Honour of all group members);
- (in the case of a joint tender) the Agreement/Power(s) of attorney drawn up using the model attached in ***Annex 3***).

The delegation of the authorisation to sign on behalf of the signatories (including, in the case of proxy(-ies), the chain of authorisations) must be evidenced by appropriate written evidence (copy of the notice of appointment of the persons authorised to represent the legal entity in signing contracts (together or alone), or a copy of the publication of such appointment if the legislation which applies to signatory requires such publication or a power of attorney). A document that the contracting authority can access on a national database free of charge does not need to be submitted if the contracting authority is provided with the exact internet link and, if applicable, the necessary identification data to retrieve the document.

4.4. Confidentiality of tenders: what information and under what conditions can be disclosed?

Once the contracting authority has opened a tender, it becomes its property and shall be treated confidentially, subject to the following:

[18] See here how to apply a QES on a document exchanged with a European institution, body or agency.

- For the purposes of evaluating the tender and, if applicable, implementing the contract, performing audits, benchmarking, etc., the contracting authority is entitled to make available (any part of) the tender to its staff and the staff of other Union institutions, bodies and agencies, as well to other persons and entities working for the contracting authority or cooperating with it, including contractors or subcontractors and their staff, provided that they are bound by an obligation of confidentiality.

- After the signature of the award decision, tenderers, whose tenders were received in accordance with the submission modalities, who are not subject to restrictive measures, have access to procurement, who are not found to be in an exclusion situation referred to in Article 138(1) of the FR, who are not rejected under Article 143 of the FR, whose tenders are not found to be incompliant with the procurement documents, and who make a request in writing, will be notified of the name of the successful tenderer to whom the contract is awarded, the characteristics and relative advantages of the successful tender and its total financial tender amount. The contracting authority may decide to withhold certain information that it assesses as being confidential, in particular where its release would prejudice the legitimate commercial interests of economic operators or might distort fair competition between them. Such information may include, without being limited to, confidential aspects of tenders such as unit prices included in the financial tender, technical or trade secrets[19].

- The contracting authority may disclose the submitted tender in the context of a request for public access to documents, or in other cases where the applicable law requires its disclosure. Unless there is an overriding public interest in disclosure[20], the contracting authority may refuse to provide full access to the submitted tender, redacting the parts (if any) that contain confidential information, the disclosure of which would undermine the protection of commercial interests of the tenderer, including intellectual property.

☝ The contracting authority will disregard general statements that the whole tender or substantial parts of it contain confidential information. Tenderers need to mark clearly the information they consider confidential and explain why it may not be disclosed. The contracting authority reserves the right to make its own assessment of the confidential nature of any information contained in the tender.

[19] For the definition of trade secrets please see Article 2 (1) of Directive (EU) 2016/943 on the protection of undisclosed know-how and business information (trade secrets) against their unlawful acquisition, use and disclosure.

[20] See Article 4 (2) of the Regulation (EC) No 1049/2001 regarding public access to European Parliament, Council and Commission documents.

APPENDIX: LIST OF REFERENCES

Award criteria	See Section 3.4
Contracting authority	See Section 1.1
Entities on whose capacities the tenderer relies to fulfil the selection criteria	See Section 2.4.3
Exclusion criteria	See Section 3.1
Financial Regulation	Regulation (EU, Euratom) 2024/2509 of the European Parliament and of the Council of 23 September 2024 on the financial rules applicable to the general budget of the Union
Framework contract	See Section 1.6
Framework contract ceiling	See Section 1.6
Group leader	See Section 2.4.1
Group member	See Section 2.4.1
Identified subcontractors	See Section 2.4.2
Involved entities	See Section 2.4
Joint tender	See Section 2.4.1
Participant Register	See Section 2.3 https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register
Selection criteria	See Section 3.2
Sole tenderer	See Section 2.4
Subcontracting/subcontractor	See Section 2.4.2
Treaties	The EU Treaties: https://europa.eu/european-union/law/treaties_en

ANNEXES

Annex 1 to 5 (click here):

Annex 1 – List of documents to be submitted
Annex 2 – Declaration on Honour
Annex 3 - Agreement/Power of attorney
Annex 4 - List of identified subcontractors and proportion of subcontracting
Annex 5.1 - Commitment letter by an identified subcontractor
Annex 5.2 – Commitment letter by an entity on whose capacities is being relied

Annex 6 – Financial tender: published as separate document

Annex 7 - Guidelines for contractors organising training events on behalf of ECDC

Additional requested documents:

Legal entity form
Financial identification form
Authorised Signatory form
Simplified Financial Statements
Curriculum vitae template
Annual declaration of interest

NB: Please click on the links above to access Annexes, or go to ECDC website (under "Useful Links"