The Guide for Quotation Request

Open Call number:	# 5
Open call title:	EOSC within National Strategies for Digital Skills
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1   Definitions

Terms	Definitions
Attachment	A document made available to Bidders in relation to this procurement.
Bidder	A Supplier submitting a tender for the supply of the requested Services.
Commencement Date	The date the Services start to be delivered.
EOSC Secretariat	The Secretariat of the European Open Science Cloud, as set up in the Grant Agreement 831644 "EOSCsecretariat.eu" between the European Commission and the EOSCsecretariat.eu consortium coordinated by TGB
RFQ	Request for Quotation
Service(s)	The services as described in this document, which the supplier has agreed to offer under the standard contractual terms supporting the supply of goods and / or services and which EOSC Secretariat has instructed the Supplier to carry out in an order.
Solution	A Supplier's response to EOSC Secretariat's RFQ in the form of an offer capable of acceptance made by the Supplier as a proposal to meet the requirements set out in this document.
Statement of Requirements	A statement issued by EOSC Secretariat detailing its Service requirement issued in accordance with the RFQ.

Supplier	An Economic Operator and could be a registered company, charitable Organization, Voluntary Community and Social Enterprise, Special Purpose Vehicle or other form of entity, who is capable of offering the requested Services.
Technopolis Group Belgium (TGB)	The contracting party, Technopolis Group Belgium (TGB), coordinator of the EOSC Secretariat project, on behalf of the EOSC Working Group on Skills and Training who is inviting Suppliers to participate in this procurement process.
Tender	The bid(s) prepared and submitted by Bidder in response to this RFQ.

2 Introduction

2.1 Contact person

The contact person for this request for quotation is:

Andrea Grisilla
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2.2 About EOSC Secretariat

EOSCsecretariat.eu addresses the need for the set-up of an operational framework supporting the overall governance of the European Open Science Cloud (EOSC). Led by a lean consortium of experienced and complementary partners, the project maintains a practical approach to address all the specific needs of the coordination structure expected by the EOSC.

Furthermore, it retains a high degree of flexibility in its roll-out plan by adopting a co-creation approach, founded on a substantial budget left available for all upcoming, foreseen and unforeseen, challenges of introducing a truly operational open science cloud serving all European stakeholders.

EOSCsecretariat.eu is also characterised by being neutral towards the community it is serving and by having a pragmatic approach that is fully dedicated to realising the outcomes of the EOSC design as stated by the Staff Working Document and adopted council conclusions.

2.3   Background

Digital and Open Science skills are a cornerstone in EOSC's operations and future. Developing and sustaining the skills of researchers, research support staff, and EOSC service providers is essential for the success of the EOSC vision. An EOSC network of skilled professionals, forming a coordinated training infrastructure, is essential to bring a culture change for sharing research outcomes, policy awareness, and compliance and knowledge of ICT support services, as well as to empower individuals and institutions to develop and maintain EOSC competences science and capabilities.

Digital Skills in the European Agenda. The magnitude of the digital skills challenge requires a long-term strategy and new partnerships between European, national, regional, public and private players including civil society. The European Commission is promoting various initiatives aimed at increasing training in digital skills for the workforce and for consumers; modernising education across the EU; harnessing digital technologies for learning and for the recognition and validation of skills; and anticipating and analysing skills needs. Member States and Associate countries have also started initiatives on up-skilling their workforce through national strategies, policies and implementation activities.

2.4   Objective of this Procurement

The EOSC WG on Skills and Training wants to commission a study to frame digital skills required in EOSC in the wider European agenda for skills and provide recommendations for MS/AC on how to include EOSC in national skills policies/strategies.

We have identified four (4) distinct tasks to be completed as part of the study with elements (non-exhaustive) the provider must take into account in their proposal and delivery.

Task 1. Landscape

This task will provide an overview of the landscape for national Digital Skills initiatives in Europe (beyond EOSC or the research sector). It will identify national strategy and initiatives for Digital Skills at MS/AC level and will report on their:

- o   goals – short and long term
- o   focus – sectors, what type of skills, what type of capacity building
- o   actors – what type of organizations are involved, at what level (e.g., policy, services, engagement);
- o   implementation – what types of instruments, activities, infrastructure do they use, what has worked, what not;

o   coordination structures within the country but also with EC and other EU initiatives.

The provider is expected to perform a brief desk research to identify ongoing initiatives in various countries. In consultation with the EOSC WG the provider will select **at least 8 countries**, covering representative regions of Europe and will perform a more detailed analysis via interviews. <u>The EOSC WG will provide a list of experts, reference points, for every country to assist in this process</u>.

Task 2. Gap analysis

This task will identify gaps and overlaps of existing national initiatives on Digital Skills compared to the envisioned EOSC Skills and Training goals and priorities proposed in the EOSC Strategic Research & Innovation Agenda (SRIA). More specifically we expect the provider to work closely with the EOSC WG key members to address issues for (non-exhaustive list):

o   Digital skills: technical and soft, ICT/software and data, open data and open science.
o   Professional development, what are the models and structures for career paths/rewards? Include diversity and inclusivity aspects.
o   Implementation and infrastructure models.

Task 3. EOSC positioning

Based on the results of the previous tasks and the emerging EOSC SRIA and Partnership documents, this task will perform an analysis and will provide insights on how to best position EOSC Skills and Training in Digital Skills national strategies and agendas. It will provide insights on the following aspects (non-exhaustive list):

o   Data intensive science and open science: role and connection with public and industry sectors.
o   Data profiles in research track. Role of university curricula in building profiles/ capacities.
o   Role and placement of EOSC related skills in institutional, national, thematic, industry Digital Competence Centres in the wider national scheme. Special consideration for HPC and AI related competence centers is required.
o   Best use of existing human and technical infrastructure (e.g., libraries, data centres).

These insights primarily target EOSC stakeholders.

Task4. Recommendations

This task will develop a list for recommendations for various types of policy makers (including EOSC stakeholders) with the purpose of providing well-rounded, all-inclusive (research-government-industry-public) options to include in national strategies for Digital Skills and up-skilling. Recommendations should include the following aspects (non-exhaustive list):

o   Human capital development, including digital skills and leadership programmes.
o   Cross-sectoral employability.

- o Building and maintaining infrastructure.
- o Shared costs and funding structures[1].

Target audience

Policy makers at all levels: Ministries shaping up national agendas; EC officials from different DGs (e.g., RTD, CNECT, EAC, GROW, IT); Research Performing Organizations for shaping organizational structures; Educational organizations for vocational training; Research funding agencies; EOSC Association; Industry associations; Civic Organizations/NGOs for understanding the skills landscape and involve their operations.

2.5 Timetable – Milestones / deliverables

The following is a tentative schedule of milestones and deliverables. Bids may propose other timelines, as long as final delivery of the report is December 15.   The EOSC WG members will provide feedback after each Milestone (M) and intermediate deliverables. The service provider may be asked to present in EOSC Symposium in Oct 2020 (virtually, if physical presence needed travel may be paid by the H2020 EOSC Secretariat project, within their set rules).

- o M1 - July 20 – start; Kick-off meeting (virtual)
- o M2 - August 10 – Inception report
- o M3 - Sept 10 -   Desk research/ selection of representative countries (Task 1)
- o M4 - Sept 30 – Landscape report (Task 1)
- o M5 - Oct 30 – Gap analysis report (Task 2)
- o M6 - Nov 20 – EOSC positioning and Recommendations (Task 3 & 4)
- o M7 - Dec 15 - Final delivery

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[1] To tackle the digital skills gap, significant investments are needed. Different funds will target different skills needs. E.g., The new Digital Europe Programme, with a budget of €600 million dedicated to advanced digital skills, will expand the digital talent pool with around 256,000 people who will be able to deploy the latest technology in business throughout Europe.

3   Statement of Requirements

3.1   Procurement plan

Below indicated procurement plan provides an overview of the key stages and dates in this procurement. EOSC Secretariat reserves the right to change these dates as necessary, although it will seek to minimise any changes.

RFQ issued	30 June 2020
Deadline for clarification Questions	13 July 2020
Deadline for Quotation responses	15 July 2020 at noon (CEST)
Contract awarded	22 July 2020
Commence date	23 July 2020

3.2   Conditions of Contract

For the supply of the requested Services, the standard contractual terms supporting the supply of goods and / or services of EOSC Secretariat are applicable. The terms are presented in a separate PDF called "Conditions of Contract" which has been published at the EOSC Secretariat web page in conjunction to this open call.

3.3   Specification

3.3.1   Scope of the contract

The contract will be for the period July – December 2020.

The budget available is up to 60.000 EUR.

3.3.2 Evaluation Criteria

Criterion 1: Expertise and previous experience – 30%

The expert(s) should have:

o Proven relevant experience in producing Digital Skills strategies and/ or reports in national, international and/ or European level(s).
o Proved relevant experience in other activities related to Digital Skills Development in national, international and/ or European level(s).
o Knowledge of Digital Skills initiatives in EU member states and Associated Countries

Please note that the minimum threshold for this criterion is 1 point. Tenders that score below that will not be reviewed.

Criterion 2: Proposed methodology – 40%

o The soundness of proposed methodology to meet the objectives of this procurement

No minimum threshold.

Criterion 3: Project Management – 15%

The expert(s) should have:

o Strong organizational and management skills (e.g. effective allocation of work, ability to plan ahead and meet deadlines)
o Strong communication skills (e.g. clear and effective communication between the expert(s) and the EOSC working group on Skills & Training)
o Proven previous experience in project management
o Well-defined proposal with clear information on deliverables, milestones, work allocation and timeline

No minimum threshold.

Criterion 4: Costs – 15%

o Cost efficiency of the budget will be appreciated.
o The budget should be well-defined, and provide clear information on the rate per hour for the consultancy and how hours will be allocated to work items.

No minimum threshold.

Every criterion will be scored:

Score	Criteria	Judgement
4	Response provides a clear and comprehensive solution to EOSC requirements and brings significant added value and benefit to the project, which is supported by evidence (where relevant) and which presents no concerns in relation to deliverability and/or performance and/or transfer of risk to TGB.	Exceeds the stated requirements/ Highly proficient
3	Response provides a clear and comprehensive solution to EOSC requirements, which is supported by evidence (where relevant) and which presents no concerns in relation to deliverability and/or performance and/or transfer of risk to TGB.	Fully meets the stated requirements/ Proficient
2	Response provides clear and comprehensive solution to EOSC requirements but there are minor deficiencies in the evidence provided (where relevant) and minor concerns in relation to deliverability and/or performance and/or transfer of risk to TGB.	Minor Reservations/ Meets some but not all requirements
1	Response provides a solution to EOSCsecretariat.eu requirements but there are major deficiencies in the evidence provided (where relevant) and major concerns in relation to deliverability and/or performance and/or transfer of risk to TGB.	Significant Reservations/ Does not meet or falls below requirements
0	The response does not meet requirements.	Not Answered/ Unacceptable/ Unskilled or well below requirements

EOSC Secretariat reserves the right not to award a Contract.

3.3.3 Eligible applicants

The call is open to individuals or organisations, or groupings thereof. Applicants may be legal entities or natural persons. In addition, the following condition apply:

- The organisations or individuals applying should have not have convictions for fraudulent behaviour, other financial irregularities, unethical or illegal business practices.
- The participating organisations should not have been declared bankrupt or have initiated bankruptcy procedures.
- Applicants who are not receiving support from other instruments (EU or national Research Infrastructure projects) for the proposed activities, and are not being funded from other sources for an identical activity

Applicants should be registered (for organisations) or resident (for individuals) in the Member States of the European Union (EU), including their outermost regions and the Associated country (AC).

More information at www.eoscsecretariat.eu/funding-opportunities

3.3.4 Evaluation procedure

In the **first stage** of evaluation, the EOSCsecretariat.eu will check admissibility and eligibility.

A tender is **admissible** if it:

- is submitted via the official online submission system before the call deadline;
- Is complete – accompanied by the relevant administrative forms, proposal description and any supporting documents specified in the call;
- Is readable, accessible and printable
- Respects the given page and/or character limits that are detailed in the online application form

A tender is **eligible** if: its contents are in line with the topic description of the call.

In the **second stage** of evaluation, an evaluation team of three experts will evaluate all admissible and eligible tenders based on the evaluation criteria detailed above. Three most successful candidates will go on to the next phase of evaluation which is an interview.

In the **third stage**, the evaluation team will interview each of the three best candidates together with the contact person of this RFQ, Andrea Grisilla. Interviews will take place online via Zoom, Skype or some other teleconference tool. The evaluation team will make a recommendation to the steering group of EOSCsecretariat.eu who make the final decision on the procurement.

The evaluation procedure takes approximately two weeks.

3.3.4 Hours and Pricing

Proposals should clearly state the rate per hour for the consultancy and a proposal for how hours will be allocated to work items. Payment will be in monthly instalments invoiced in arrears, linked to deliverables / milestones. Payment by EOSC Secretariat will be within 30 days of receipt of invoice when the deliverables and milestones as specified in sections 2.4 and 2.5 are met and accepted. Only real costs, documented in receipts, without overhead, can be covered. Subcontracting and indirect costs are not eligible. Applicable taxes are extra and must be itemized separately in a proposal. Any additional costs must be detailed in your quotation.

All travel must be agreed with the EOSC Secretariat Coordinator before being undertaken and must be billed against the EOSC Secretariat Travel Policy rules in Europe. Travel and accommodation considering 1-night stay per person can be claimed up to €650; 2-nights stay per person up to €850; 3-nights stay per person up to €1050, etc. Per diem is not applicable.

All costs are reimbursed based on receipts. Please see the summary of travel policy below:

Cost	Claimable
Hotel cost	Where accommodation is not provided actual cost will be reimbursed up to 150 euros per night including breakfast.
Air travel	All air travel should be Economy Class flights, maximum of €500
Rail travel	All rail travel should be second class rail, maximum of €500
Travel by car	0,22 EUR / kilometre
Local travel	Most efficient and reasonably priced method of travel between point of arrival (airport, train station), hotel and venue.
Travel Insurance	Actual cost up to a limit of 20 euros for 6 days travel.

Lunch	If not provided. Actual cost up to a limit of 18 euros per day.
Dinner	If not provided. Actual cost up to a limit of 50 euros per day.
Travel Visa Fees	May be supported by scans of Visa in passport showing cost.

Please, note that traveling outside EU member states has to be discussed and agreed with the contact person of this RFQ well in advance. Decisions will be made on a case-by-case basis.