

ARTEFACT DOCUMENT

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Guidance Document

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1 PREFORMA GUIDANCE

These Guidance notes complement the Invitation to Tender ([Invitation to Tender_1](#)) and are designed to help with completing the Tender Form ([Tender Form_4](#)).

1.1 GUIDANCE ON COMPLETING THE TENDER FORM

These notes should be read in conjunction with the Tender Form ([Tender Form_4](#)) and are designed to help you to provide the information required. **Where text limits are indicated, please do not exceed these.**

The Tender Form should be completed using a font size no smaller than 10 (Arial). Keep the use of acronyms to a minimum. Only use acronyms where a term is mentioned frequently throughout the tender. If you do choose to use an acronym, do not assume that the reader knows what it means, and be sure to define it, bearing in mind that individual sections of the tender may be read separately during the selection process.

In order for your tender to be evaluated you must submit all the required information. This includes all mandatory fields from the Tender Form. Failure to complete these fields will result in your tender being rejected on the grounds that it is incomplete.

For details on how to tender, please see:

Invitation To Tender document ([Invitation to Tender_1](#)) (download available at the project website: www.preforma-project.eu).

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2 TENDER FORM MANDATORY FIELDS

2.1 TENDER, TENDERER AND CONTACT DETAILS

2.1.1 Tender (Mandatory)

- **Project title (Mandatory)**

Please provide the title for the project. This should be both clearly descriptive and concise. It should contain keywords relevant to the project.

- **Validity of Tender (Mandatory)**

The period in course of which you are bound by the tender in relation to its content and conditions offered. Indicate agreement by choosing yes.

- **Contract Duration (Mandatory)**

This section may have already been completed, as usually Phase 1 is of a fixed duration.

- **Phase 1 Contract Price, (Mandatory)**

State a total price of for the tendered project, phase 1. Use a fair market price. Prices shall be stated in Euros, exclusive of VAT, but should include possible duties, custom fees, taxes or other charges that may occur.

- **What is the best way to describe your innovation? (Mandatory)**

- **Proposed Start Date (Mandatory)**

2.1.2 Tenderer Details (Mandatory)

Please submit the name of your legal entity, proposed sub-contractors and other details as requested on the Tender Form.

If the tender is submitted by a consortium that does not in itself constitute a legal entity, such tenderer shall appoint a consortium member to be the contracting party in case the tendering consortium is awarded a contract.

2.1.3 Contact Details (Mandatory)

Please submit the lead tenderer's name, post held, name of legal entity, position etc. Lead tenderers are expected before submitting tenders, to have discussed their proposals with their own organisation or any other body whose co-operation will be required in the conduct of the project. By submitting the tender you are confirming that the information given, in this tender, is complete and that you are actively engaged in this project and responsible for its overall management and agree to administer the award if made. In addition, please provide details of where you heard about the PCP.

2.2 IMPACT ON THE CHALLENGE

2.2.1 I. Title and Description of Proposed Idea/ Solution/ Technology and its Expected Impact on the Challenge (Mandatory)

Avoiding the use of unnecessary technical jargon, describe clearly how the proposed project will deliver the outcomes as described in the Invitation to Tender and Challenge Brief documentation.

2.2.2 II. Potential of the Proposed Idea/ Solution/ Technology to Address Future and/ or Wider Challenges in the Area (Mandatory)

Avoiding the use of unnecessary technical jargon, describe clearly the potential of the proposed project to address future and/ or wider challenges in the area described in the Invitation to Tender and Challenge Brief documentation.

2.2.3 III. Commercial Feasibility and Route to Market (Mandatory)

Describe the commercial feasibility of the new solution. We are seeking evidence that the new solution can be made into a viable product and achieve the proposed benefits.

2.2.4 IV. Cohesiveness

Describe the extent to which the approach is cohesive with the open source development values and objectives that are central to the PCP.

2.3 TECHNICAL APPROACH

2.3.1 IV. Scientific/ Technical Project Summary (Mandatory)

Please provide a structured summary of the scientific and technical basis of the project. This would typically involve highlighting the research and development that will prove the merit of the project. Please provide details of any competing technologies/ market alternatives and the relative benefits of the proposed approach. Include details of any existing IP and its significance to your freedom to operate.

It is an absolute requirement that the services offered by the tenderer are within the scope of the definition of R&D services, as outlined in the invitation to tender.

2.4 QUALITY OF THE TENDER

2.4.1 I. Project Plan and Methodology (Mandatory)

The project plan should identify the major packages of work within the project, with well-defined milestones and deliverables. The plan for Phase 1 should be comprehensive – for Phase 2 and Phase 3 only an outline is required.

The emphasis throughout should be on practicality – we are seeking evidence that a working new solution can be developed in time (end of Phase 3). Appropriate record-keeping and reporting are essential but reports are not in themselves the main goal of the project.

- A Gantt chart should be supplied (in Microsoft Office, Microsoft Project or PDF format).
- Please provide an indication of how any IP which might arise during the project would be handled.
- Allow for preparation of a detailed plan for Phase 2, towards the end of Phase 1.

(Progression to Phase 2 is dependent upon successful completion of Phase 1 and on phase 2 bids and assessment, likewise for Phase 3).

2.4.2 II. Project Management (Mandatory)

Identify the project management processes that you will use to ensure that milestones are achieved in a timely manner.

2.4.3 III. Resources (Mandatory)

Describe in detail the skills, expertise and track record of the team, including relevant knowledge and skills of each member and the proportion of their time that will be spent on the project. Relevant commercial and management expertise should also be included. Also include the expertise of any subcontractor/s.

2.4.4 IV. Risk Management (Mandatory)

Provide details of identified risks (technical, commercial and environmental) and mitigation actions.

2.5 POTENTIAL PRICE IN PHASE 2 AND 3 (MANDATORY)

Give an indication of the potential price for Phase 2 and Phase 3. Use a fair market price. (See [Framework Agreement_6](#)).

2.6 PROFESSIONAL SECRECY (MANDATORY)

Please indicate which parts of the information in the tender that should be confidential, and indicate why disclosure of such information may be harmful to you.

2.7 PROJECT ABSTRACT (MANDATORY)

Please enter a brief abstract of your project that can be used for marketing purposes of successful tenders, e.g. between 50 to 150 words. Make sure that the wording is understandable to the general public.

2.8 FIXED PRICE BREAKDOWN (MANDATORY)

Please provide a breakdown of the fixed price for phase 1 in the table. The quoted unit prices will be binding for the duration of the framework agreement. Divide labour unit prices into suitable categories (e.g. junior, senior researchers, developers, testers, etc.).

The cost breakdown will form a basis for any audit or other verification process from the authority, during or after the project, in order to safeguard that (i) what was supplied actually qualify as R&D services, and – if applicable – (ii) the major part of the procured services were actually performed in a Member State or an associated country. Such audit or verification may nevertheless also involve other elements, not necessarily defined beforehand but that have a bearing on these issues.

2.9 DECLARATIONS (MANDATORY)

Please read carefully and sign the declarations as appropriate.