

## **Annex IX - Ordering process**

### ***Process for ordering Time and Means services***

1. A Request for Services Form is completed by the Agency, in which the request for services is summarised and timelines are given for responses from the contractor and it is sent by e-mail to the first priority contractor in the cascade.
2. The contractor is required to acknowledge receipt of the Request for Services Form and its willingness to make an offer or to decline to make an offer by e-mail to the Agency within three working days of the date on which the Request for Services Form was sent out by the Agency. If the contractor declines to make an offer or fails to respond by the due date indicating its willingness to make an offer, the Agency will then forward the Request for Services Form to the next contractor in the cascade.
3. By the date specified in the Request for Services Form the contractor is required to propose to the Agency by e-mail the CVs of candidates matching the requirements in the Request for Services Form. The Europass CV template must be used as per the Agency's instructions. The Europass CV can be downloaded from the following website:

<http://europass.cedefop.europa.eu/europass/home/vernav/Europass+Documents/Europass+CV.csp>

4. If one or more CVs are found to be acceptable: all candidates proposed must be available for interview at the Agency or by tele/video-conference in the two weeks following the sending of the CVs. If the contractor does not comply with the timelines specified or the CVs are not acceptable, the contractor will be deemed to have not respected the requirements and the Agency may forward the Request for Services Form and documents to the next contractor in the cascade.
5. If the Agency accepts a candidate(s) as a result of interviews, the Agency will send an e-mail to the contractor indicating that the candidate(s) has been accepted and will request a formal offer from the contractor. Having conducted up to three interviews without identifying a suitable candidate the Agency reserves the right to go to the next contractor in the cascade.
6. If a candidate(s) is found to be unacceptable to the Agency, the Agency will advise the contractor by e-mail and will give feedback, wherever possible, on the reasons why the candidate(s) has been rejected. If the final offer date in the Request for Services Form has not yet been reached, the Agency may permit the contractor to forward more CVs for consideration. If the final offer date has been reached, the contractor will be deemed not to have fulfilled the requirements and the Agency may forward the Request for Services Form to the next contractor in the cascade.
7. Once a candidate(s) has been confirmed and a formal offer received from the contractor, the Agency will draw up the specific contract for signature which will include the details of the work to be carried out, the start date, the duration in person-days and any other relevant information.
8. Should the contractor not be eligible for consultancy in the requested domain, for example because it is unable to supply the service or fails to fulfil the minimum requirements set out in a request for services, or in the case of a conflict of interest, the contractor shall be considered as unable to fulfil the request for services and the cascade may be invoked.

## ***Process for ordering services on a fixed price or quoted time and materials basis***

In certain circumstances the Agency may require services to be provided on a quoted time and materials (QTM) or fixed price (FP) basis. The Contractor undertakes to deliver as specified for a given price within a given timescale.

The ordering process for fixed price or quoted time and materials orders is as follows:

1. A Request for Services Form is completed by the Agency, in which the request for services is summarised and timelines are given for responses from the contractor and it is sent by e-mail to the first priority contractor in the cascade.
2. The contractor is required to acknowledge receipt of the Request for Services Form and its willingness to make an offer or to decline to make an offer by e-mail to the Agency within three working days of the date on which the Request for Service was sent out by the Agency. If the contractor declines to make an offer or fails to respond by the due date indicating its willingness to make an offer, the Agency will then forward the Request for Services Form to the next contractor in the cascade.
3. The contractor must present an offer meeting the requirements as specified by the Agency in the Request for Services Form and associated documents (e.g. specifications, work packages, deliverables, activities, deadlines etc.). The Agency may ask the contractor to provide CVs of the proposed team-members and may ask to meet or interview them.
4. The offer must include detailed calculation of the total price for the services, including the number of days worked per type of consultant and the total prices per type of consultants.
5. If the offer is found to be unacceptable to the Agency, the Agency will advise the contractor by e-mail and will give feedback, wherever possible, on the reasons why the offer has been rejected. If the final offer date in the Request for Services Form has not yet been reached, the Agency may permit the contractor to modify its offer for consideration. If the final offer date has been reached, the Contractor will be deemed not to have fulfilled the requirements and the Agency may forward the Request for Services Form to the next Contractor in the cascade.
6. Once the offer has been confirmed and a formal offer received from the contractor, the Agency will draw up the specific contract for signature which will include the details of the work to be carried out, the start date, the duration and any other relevant information including the deliverables.
7. Should the contractor not be eligible for consultancy in the requested domain, for example because it is unable to supply the service or fails to fulfil the minimum requirements set out in a request for services, or in the case of a conflict of interest, the contractor shall be considered as unable to fulfil the request for services and the cascade may be invoked.