

MIELES PROJECT –INSTRUCTIONS

In accordance with the Erasmus+ Programme - Capacity-Building projects in the field of Higher Education (E+CBHE) - Guidelines for the Use of the Grant - For grants awarded in 2016 under Call EAC/A04/2015

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MIELES PROJECT – EQUIPMENT PURCHASE INSTRUCTIONS

In accordance with the Erasmus+ Programme - Capacity-Building projects in the field of Higher Education (E+CBHE) - Guidelines for the Use of the Grant - For grants awarded in 2016 under Call EAC/A04/2015

Equipment

This budget heading may be used to support the purchase of equipment on the condition that such equipment is directly relevant to the objectives of the project. In MIELES, the equipment should be purchased as follows:

10 units of an E-learning Online Training Software - Articulate Storyline 2
1 Server
6 Laptops and 2 PCs for E-learning Infrastructure
1 Projector for webinars
1 Multifunction printer for project coordination
1 camera and audio recorder

TOTAL BUDGET: 35.950 EUROS (*Note: VAT is not eligible*)

Equipment costs will be reimbursed on the basis of the eligible costs actually incurred.

The equipment must be recorded in the inventory of the institution where it is installed; this institution is the sole owner of the equipment. All equipment purchased with the Erasmus+ CBHE funds must bear an Erasmus+ sticker provided by the Agency.

Taxes (VAT, duties and charges)

Any expenditure including VAT, duties and charges (such as customs and import duties) are not eligible unless the coordinator can provide an official document from the competent authorities proving that the corresponding costs cannot be recovered. In any case, taxes and duties have to be treated in accordance with the tax exemption agreement, signed between the European Union and the Partner Country for which the equipment or services are destined.

Exchange rate

(...) Any conversion into euro of actual costs incurred in other currencies shall be made by the beneficiary at the monthly accounting rate established by the Commission and published on its website

(http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm)

applicable:

- on the month of the receipt of the first pre-financing for all costs incurred until the second pre-financing is received (**DECEMBER 2016 - 1 INR = 0.01376 EUR**) and
- on the month of the receipt of the second pre-financing for all costs incurred until the end of the project (**JULY 2019 - 1 INR = 0.01273 EUR**).

The invoice date will be taken into account to determine the applicable monthly exchange rate.

Award of Contracts and Tendering procedure

Background

(...) where the value of a contract awarded in accordance with those Articles is over EUR 25.000 and less than EUR 134.000, the beneficiaries shall launch a tendering procedure and obtain competitive offers from at least three suppliers and retain the one offering best value for money, observing the principles of transparency and equal treatment of potential contractors and taking care to avoid conflicts of interests.

(...) Please note that the beneficiaries may not split the purchase of equipment into smaller contracts below the threshold in order to avoid launching a formal tendering procedure. The points mentioned below are a quick guidance to help the beneficiaries when preparing their tendering procedure.

It is provided for guidance purposes only and its content is not intended to replace consultation of the applicable rules or the necessary advice of an expert, where appropriate.

General Guidance to prepare a tendering procedure

When it comes to tendering a key aim of each beneficiary institution is to purchase the most qualitative equipment/services/supplies at the best price (sound financial management) while also ensuring that the required equipment/services/supplies are made available within agreed timeframes. **Tender specifications** are mandatory and instrumental in achieving this goal. Tender specifications describe **what the beneficiary institution is going to buy**. The quality of the description determines not only the quality it will get, but also the price that it will pay. It is also particularly important to ensure total consistency between the tender specifications and the other tender documents (i.e. the invitation to tender, draft contract and various annexes).

The tender specifications must always indicate (see explanation under section 3.2.5.3):
the **exclusion** and **selection criteria** that must be fulfilled by tenderers (analysis of the tenderers)
the **award criteria** and their relative weighting (analysis of the quality and price)
the **technical requirements**, i.e. the technical specifications (including, whenever relevant, the minimum technical requirements)

The following general requirements should also be followed as principles:

- the description must be comprehensive, clear, precise and transparent
- the tender specifications must ensure equal access to tenderers (equal treatment and non-discrimination) and must not have the effect of creating unjustified obstacles to competitive tendering (widest competition possible)
- the choice of the criteria described above (exclusion, selection and award) has to be proportional in relation to the subject and the value of the purchase
- Sound financial management

Establishment of an evaluation committee

Each tendering procedure must contain at least the following elements:

- Invitation to tender

- Tender specifications
- Minutes of the tender opening
- Tender evaluation report from the evaluation committee
- Commercial offers
- Etc.

Please note that the beneficiaries must clearly document each tendering procedure and retain all the documentation in particular for audit purposes in accordance with Article II.27 of the General Conditions of the Agreement.

Specific Guidance to prepare a tendering procedure

When preparing the tender specifications, the beneficiaries should make sure to address all the issues underlined below:

Information on tendering

The information provided in this part of the tender specifications is of a more administrative nature. It addresses issues such as:

- participation in the procedure (access to the market)
- contractual conditions
- joint tenders
- subcontracting
- content and period of validity of the tenders
- identification of tenderers (legal capacity and status)
- etc.

Title, purpose and context

The title should, as much as possible, be short and precise and refer to the subject of the contract. It must be used consistently throughout the documents issued during the procedure. The beneficiaries have to provide with as much background information and (Internet based) reference documents as possible. This will help avoiding potential unequal treatment of tenderers.

The technical specifications

The technical specifications describe what the beneficiary's institution is going to buy. The description should be comprehensive, clear and precise. Providing tenderers with the fullest possible information is the only way to avoid possible unequal treatment. It should include the characteristics and technical requirements of the products, services or materials to be ordered, considering the purpose for which they are intended by beneficiary's institution. These characteristics may include:

- the quality levels
- the levels and procedures of conformity assessment
- safety or dimensions, including, for supplies, the sales name and user instructions, and, for all contracts, terminology, symbols, testing and test methods, packaging, marking and labelling, production procedures and methods
- delivery and payment terms

- warranty service and technical support conditions
- etc.

In marginal cases where it is not possible to provide a sufficiently detailed and intelligible description of the subject of the contract, the description must be followed by the words "or equivalent".

The duration of execution of tasks must also be specified. It is recommended to include the period of approval of deliverables in the period of execution of the tasks.

Estimate value of the contract

The estimate value of the contract must be specified. Indeed, it is essential that interested economic operators are perfectly aware about the size of the contract they are competing for.

Evaluation and award of the contract

This part of the tender specifications describes the evaluation process and specifies the different types of criteria which will be applied to decide on the award of the contract:

- the **exclusion criteria** allow the beneficiary to determine whether an economic operator is qualified to participate in the tendering procedure.
- the **selection criteria** is to allow the beneficiary to determine whether a tenderer has the financial, economic, technical and professional capacity necessary to carry out the work and in principle they relate to their past experience. Selection criteria are not exhaustive and are general in nature. They must be drafted in a non-discriminatory manner that is consistent with the purpose and complexity of the future contract.
- finally, the **award criteria** will allow the beneficiary to choose the best tender out of those submitted by tenderers which are not excluded and which meet the selection criteria.

The **award method will be the "best value for money"** meaning that the winning tender is the one offering the best quality/price ratio, taking into account the criteria announced in the specifications.

Compared to the equipment as specified in the original application, minor adaptations in terms of quantity and product in the purchased equipment can be accepted without prior authorisation provided that the **budgetary ceilings** are respected, the corresponding equipment items are eligible, the modification can be justified and is related with the project objectives.

In case of significant changes of the equipment to be purchased compared to the equipment as specified in the original application, prior written authorisation from the Agency should be given during project implementation.

Supporting documents:

Partners will have to send the following documents will have to **retain with the project accounts** the following supporting documents:

- **Invoice(s) and bank statement(s) for all purchased equipment (please note that order forms, pro-forma invoices, quotations or estimates are not considered as proof of expenditure).**
- **Documentation on the tendering procedure and three quotations from different suppliers.**
- **Proof that the equipment is recorded in the inventory of the institution.**
- **Pictures of the purchased equipment with the Erasmus+ Sticker**

In addition, the declared costs must be identifiable and verifiable, in particular being recorded in the accounting system of the beneficiary. Furthermore, the equipment must be properly registered in the inventory of the institution concerned.

For equipment with a total value of more than EUR 25.000, a copy (not original) of the invoice(s) and the competitive offers must be sent as supporting documents.