

# Qualification Document 24/2010

Template for limited tendering according to Part I and  
Part II of Regulations for Procurements below EEA  
Threshold Values

for purchasing of

## **Consultancy Work**

**Update of the NAAG LCG/1 document “NATO  
SOLDIER MODERNISATION MEASUREMENT FOR  
ANALYSES – a framework for modeling and trials”**

for delivery to

Forsvarets forskningsinstitutt (FFI)  
Norwegian Defence Research Establishment

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# **1 GENERAL DESCRIPTION**

## **1.1 The customer**

Forsvarets forskningsinstitutt (the Norwegian Defence Research Establishment, hereafter named FFI) is a civilian institution of research directly answerable to the Norwegian Ministry of Defence. The establishment has 660 employees, of whom 450 are research scientists and engineers who are engaged in the development of technology and expertise to enable Norway to maintain a modern and effective national defence. FFI is a multidisciplinary enterprise covering such fields as mathematics, physics, information technology, chemistry, biology, medicine, psychology, political science and economics. It is located at Kjeller near Lillestrøm, and also has a smaller division at Horten. For more information, please see our internet web pages [www.ffi.no](http://www.ffi.no).

## **1.2 Objective of the procurement**

FFI has in its Test & Evaluation of the NORMANS prototype systems used the NAAG LCG/1 document "NATO SOLDIER MODERNISATION MEASUREMENT FOR ANALYSES – a framework for modeling and trials". The current version of the document dates back to 2005. The document is used both for trial planning, execution and analyses as well as for the formal requirement process in the "NORMANS kompanisett" program.

FFI's significant use of the NATO document has exposed shortcomings in the document. Vignettes need to be updated, analytical methods and models need to be developed and the areas covered need to include all LCG/1 defined capability areas.

The Norwegian delegation to LCG/1 has proposed an update of the NATO document as a cooperative task between nations actively participating in the NATO group. The Norwegian representative in the group will be FFI.

FFI request support to draft in cooperation with allied nations an updated version of the NATO document and to take the position as the secretary of the FFI chaired Team of Experts to update the document.

More information about the procurement are specified in point 4 in this document.

## **1.3 Size of procurement and value of contract**

The estimated value of this procurement lies below the threshold for EEA announcements; hence the decision to follow the regulations in Part II of the "Regulations on Public Procurement".

## **1.4 Composition of the tender document**

The tender document consists of this template and its associated attachments:

1. NATO Soldier Modernisation ..... (Annex A). Will be sent afterwards to qualified tenderers.
2. HES statement regarding health, environment and safety. (Annex B)

3. General Purchase Conditions, Form 5052 (March 2008) (Annex C)

## 1.5 Announcement of contract notices/invitation for tenders

Contract notices/invitations to submit tenders will be publicly announced in the Norwegian national tender notification service DOFFIN [www.doffin.no](http://www.doffin.no).

## 1.6 Other information

In the event a supplier feels that the guidelines in the tender document are unclear, or that there are errors in the document, the supplier may submit a written request for more information to the customer through Merzell Sourcing Service's Procurement Tool, KGV (Norwegian, "Merzell Konkurransgjennomføringsverktøy", or KGV).

## 1.7 Corrections, supplementary information, or changes to the tender document

The customer reserves the right to make corrections, provide supplementary information or make changes to the tender document as long as these adjustments are not of a substantial nature.

Revisions, corrections, supplementary information, or changes to the tender document will be sent to all recipients of the original document immediately. Announcements concerning revisions, corrections, supplementary information or changes to the tender document will be made electronically on DOFFIN and TED (Tenders Electronic Daily) through the Merzell Procurement Tool (KGV).

## 1.8 Progress schedule

The customer has established the following timescale for the process:

Task	Target dates
<b>Qualification</b>	
Announcement in DOFFIN	17 June 2010
Deadline for delivering qualification documents	24 June 2010 by 1200 p.m
Opening of qualification documents	24 June 2010 by 1200 p.m
Qualification of Tenderer finished	28 June 2010
<b>Competition</b>	
Tender document sent to qualified Tenderer	28 June 2010
Deadline for submission of Tenders	5 July 2010 by 1200 p.m
Opening of Tenders	5 July 2010 by 1200 p.m
Possible meetings for purposes of clarification	Week 27, 2010
Evaluation	Week 27, 2010
<b>Selection</b>	
Awarding of contract and notification to other tenderers	Mid July 2010
Disputes – deadline for submission of tenderer complaints	Mid July 2010
Signing of contract	Late July 2010

Project start	Late July 2010
Formal Team meeting	September/October 2010
Draft document delivery	December 2010
Input to FFI proposed future Programme of work within the LCG/1 SCAG	February 2011
Presentation of deliverables to Chairman LCG/1 SCAG	February 2011
End of project	March 2011

Please note that the target dates following the opening of tenders are intended as a guideline only and may be subject to change.

## 2 RULES FOR THE SUBMISSION OF TENDERS

### 2.1 Procurement procedure

Procurements are to be made according to the Law of Public Procurement of 16 July 1999 (Norwegian, "*Lov om offentlige anskaffelser av 16. juli 1999*" or LOA), and the Regulations Governing Public Procurements of 7 April 2006, no. 4022 (Norwegian, "*Forskrift om offentlige anskaffelser (FOA) av 7. april 2006 nr. 4022*"). The procurement process will be conducted through the system of limited tendering in accordance with Part I and Part II of the Regulations (below the EEA threshold value). The type of procurement is "Purchase of services".

All interested Tenderers may take part in the competition and ask for the qualification documents. The tender document is thereafter sent to all qualified tenderes which in that way are invited to participate in the competition.

Negotiations are not permitted. Once submitted, tenders may not be altered, nor may any adjustments be made to the terms stated therein by means of negotiation on price, delivery time or other conditions affecting the competition. Tenderers should therefore give their best offer within the specified closing date of the competition.

Norwegian Ministry of Defence regulations on procurement will be adhered to where the Law of Public Procurement (LOA) or the Regulations Governing Public Procurement (FOA) do not apply.

### 2.2 Language

All written and oral communication with regards to this competition shall be in Norwegian or English.

## **2.3 Mercell Sourcing Service's Purchasing Tool (KGV)**

The competitive tendering process will be administered through use of Mercell Sourcing Service's Purchasing Tool (KGV). All inquiries concerning the invitation to tender should be made through the Mercell communication module so that they may be documented and registered. Verbal responses and descriptions will not be considered unless they are formally documented in writing.

Please contact Ragnar Synstad or Rune Johansen at Mercell support +47 21 01 88 60 with questions. If assistance is needed after 1700, please contact: Une Moslet at +47 97 58 92 62.

## **2.4 Qualification requirements**

The supplier must fulfil the qualification requirements for participation in the selection process in the competition:

Documentation of the qualification requirements is added under "Kvalifikasjonskrav" in Mercell and answered as described under pkt 3 "Qualification Requirements" in the Tender Document.

To be qualified for participation in the competition all the requirements must be answered with "Ja" and valid documentation must be attached.

The NAAG LCG/1 document "NATO SOLDIER MODERNISATION MEASUREMENT FOR ANALYSES – a framework for modeling and trials" will be sent afterwards only to Tenderer who are qualified.

## **2.5 Electronic signature**

In this connection there will be asked for electronic signature for validation of the identity of the supplier. Electronic signature can be provided from [www.commfides.com](http://www.commfides.com), [www.buypass.no](http://www.buypass.no) or [www.bankid.no](http://www.bankid.no). We call attention to that it may take some weeks to receive electronic signature.

Suppliers who download tenders after the tender due date will be rejected.

Mercell Kundesenter, tlf +47 21 01 88 60 will assist suppliers who need technical support regarding the Mercell tool or electronic signature.

## **2.6 Confidential information**

According to § 23 in the Law Relating to Public Access to Documents in the Public Administration (Norwegian Freedom of Information Act or in Norwegian, "Offentleglova"), information contained in public procurement tenders may be held in confidentiality until the contract has been awarded. After that, barring other extenuating circumstances such as business confidentiality or issues of national security, the information contained in the tenders may be made public. If the tender or parts of it should remain confidential, also after the contract has been awarded, this should be clearly stated in the tender at the time it is submitted.

## **2.7 Client Confidentiality**

FFI and its employees are obliged to prevent that persons not concerned are admitted access or knowledge to information concerning technical arrangements, procedures, management or business matters that for security reasons should be kept secret. cf. FOA § 3-6, jf. forvaltningsloven § 13.

## **2.8 Use of FFI name for marketing purposes**

Vendors must obtain permission from FFI in order to use the business relationship between FFI and the vendor following the award of a contract for advertising/marketing purposes. This restriction applies to any form of advertising, both internal and external, whether in word, speech or image.

## **2.9 Deadline for submission**

The deadline for submission of the documentation of quality requirements is set to Friday 24 June 2010 by noon (1200 p.m.). Later submissions will be rejected.

## **2.10 Exceptions and deviations**

If a tenderer wishes to make certain exceptions and stipulations to certain parts of the tender document, this should be clearly stated in the tender. These provisos should be clearly specified in the bid, and their implication for performance, price or other relevant factors should be clearly stated.

The same terms apply to deviations. Exceptions and deviations should be formulated precisely and clearly so that the purchaser can assess them without having to contact the supplier. Exceptions and deviations should refer to the relevant point in the tender document and should be specified and discussed in a separate enclosure (see point 2.5.). Exceptions and deviations of a substantial nature will result in the tender being refused.

## **2.11 Subcontractor**

FFI desires to work with a single source vendor who can document the desire and capability of assuming responsibility for the entire delivery. If in order to be able to furnish a bid for complete delivery of goods or services, the vendor wishes to include sub vendors, the applying vendor should appear in the tender document as the primary tenderer. FFI reserves the right to disallow the tenderer's choice of sub vendor. The main supplier should be able to enter into a long term cooperative effort with FFI for common administration of the system described in the invitation for tenders. FFI should be advised of any changes of sub vendors well ahead of time, and the primary supplier agrees to provide any analysis certificates that may be requested in the transition phase.

### 3 QUALIFICATION REQUIREMENTS

The separate points in the qualification requirements in the suppliers start menu is answered in the following way :

- Choose "Ja" from the drawdown menu to the question: Er du kvalifisert? (Are you qualified?)
- Attach necessary documentation to the qualification requirements.
- Eventually give your comments to the requirements and answers in the writing area to the left.

#### 3.1 Vendor's organisational and juridical position

Requirements - examples	Documentation requirements - examples
The vendor shall be a legally established business enterprise.	<ul style="list-style-type: none"> <li>• Norwegian firms: Company registration certificate.</li> <li>• Foreign enterprises: Official documentation that the company is formally registered in the relevant business directory or formal registry of business enterprises in the country in which it is established.</li> </ul>

#### 3.2 Mandatory requirements

Requirement	Required documentation
The vendor should be current and up to date in the payment of income tax and value added tax.	<ul style="list-style-type: none"> <li>• Paid income tax statement (In Norway, tax statement are issued by the municipal treasurer – Form RF-1244 in Norway and should not be more than 6 months old).</li> <li>• Value added tax certificate (VAT certificates in Norway are issued by the department of revenue – Form RF-1244, and should not be more than 6 months old).</li> </ul>
The vendor should have a functional HES system	<ul style="list-style-type: none"> <li>• HES-self-certificate (Health, environment and safety) signed by the management and a representative of the employees. An example of the form is attached.</li> </ul>

Foreign vendors should provide certificates of compliance issued by the relevant authorities in their own countries.

#### 3.3 Vendor's economic and financial position

Requirements - examples	Documentation requirements - examples
The vendor shall have the economic capacity to deliver/carry out the contract.	<ul style="list-style-type: none"> <li>• Credit check/rating within the past year based on the last publicly available accounting figures. Credit rating to have been assessed by a publicly approved credit rating institution. The rating shall be credit-worthy or higher.</li> </ul>

If there are legitimate reasons that prevent the vendor from providing the specific documentation the customer requests, the vendor may provide other supporting documentation acceptable to the customer which proves his economic and financial position.



### 3.4 Vendor's technical and professional qualifications

Requirement	Required documentation
The personel involved in this project must be cleared for work with the Norwegian Armed Forces.	List with names and "personnummer" (national identity number) for employees which have Security Clearance "Confidential" or higher. The validity of this will be checked by the FFI.
The vendor should be experienced in the relevant line of NATO-work and should have successfully executed similar contracts on earlier occasions	A list of references of important contracts the vendor has executed within the last three years, including the value of the contract, the time it was executed, and contact name and telephone of a reference person in the firm commissioning the contract and to whom the delivery was made. Reference may be contacted with no further notice.
Knowledge in using systematic test and evaluation methods	Clearly, and with references, show the Tenderer's knowledge in using systematic test and evaluation methods in relation to Dismounted Soldier Systems
Knowledge of the NATO process	Present the Tenderer's knowledge of the NATO process, and if possible, the knowledge of the LCG/1, the NATO document (to be sent), its origin and its future
Qualifications of the offered personel	Name and CV for Consultants dedicated for this project. Further the Consultants connections to the reference contracts.
FFI claims a well functional quality assurance system	Explanation of the tenders quality assurance system to make sure that the project is to be completed in an efficient and a functional way.
The vendor shall have military experience and operational military qualification	CV including rank and time of service
Knowledge of mission, vignette, MOE (Measurement of effectiveness) and MOP (Measurement of Performance) development	References
Knowledge of test and evaluation methods for development of Dismounted Soldier System (DSS) capabilities	References
Knowledge of analytical models used, and the development of analytical models to be used for DSS	References

## 4 PROCESSING OF SUBMITTED INQUIRES

## **4.1 Registration of inquires**

All incoming inquires are registered in the Merzell Purchasing Tool (KGV).

The opening of tenders will not be public.

## **4.2 Rejection of submitted inquires**

Tenderers who fail to submit income tax statements and workplace health and safety statements by the closing date of the invitation to tender will be rejected, likewise tenderers who do not fulfil the established and announced qualification requirements.

Furthermore, the customer may refuse tenderers for other reasons, cf. FOA § 11-10 (Regulations Governing Public Procurement), or for grounds and procedures that fall under Part I and Part II of the above-mentioned Regulations, such as:

- bankruptcy, if the company is in receivership or in the process of liquidation, suspension of business operations or in the process thereof according to national laws and regulations;
- petitioning for bankruptcy, initiation of debt settlement procedures or compulsory dissolution of the enterprise according to national laws and regulations;
- the company has, by legally enforceable judgment, been found guilty of unlawful conditions with respect to its professional conduct;
- the company has breached professional and ethical norms in its branch of operations;
- failure to pay social security insurance in the company's country of establishment or in Norway;
- failure to pay taxes and public duties according to the statutes of law in the country in which the company is established or in Norway;
- grossly misleading or falsification of information and/or withholding of information mentioned herein; likewise falsification/withholding of information with respect to the customer's stated requirements for suppliers.

## **4.3 Cancelling the competition**

FFI can cancel the competition or reject all offers if there is a factual reason for it.