









TENDER DOSSIER

SUBMISSION DEADLINE October 20, 2022

Project Title:

SOCIAL ENTREPRENEURSHIP ECOSYSTEM (SEE) CHANGE

Prepared by:
BEYOND GROUP
beyondgroupconsulting.com

TRAINING & COACHING EXPERTS FOR SOCIAL ENTREPRENEURSHIP SUPPORT ORGANIZATIONS

REQUEST FOR TENDER

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SECTION 1 - INSTRUCTION TO THE TENDERERS

General instructions

	A. GENERAL PROVISION	S	
1.	Introduction	1.1	This is a "split-tender", meaning that various contracts can be awarded to different tenderers meeting the criteria and covering part of the required services
		1.2	Experts shall adhere to all the requirements of this Tender, including any amendments in writing by Beyond Group
		1.3	The tenderer should meet all the criteria as stated in this Tender
		1.4	Any tender submission will be regarded as an offer by the tenderer and does not constitute or imply the acceptance of the proposal by Beyond Group. Beyond Group is under no obligation to award a contract to any tenderer as a result of this Tender
2.	Eligibility	2.1	It is the tenderer's responsibility to showcase eligibility by providing CVs, portfolios, or any supporting documents relevant to this tender's scope
		2.2	Tenderers are eligible to apply to the full or to only part of the scope of work, as described in "Paragraph 2" of this tender
	B. PREPARATION OF PR	OPOSA	LS
3.	General Considerations	3.1	In preparing the proposal, the tenderer is expected to examine the Tender in detail. Material deficiencies in providing the information requested in the Tender may result in rejection of the proposal.
		3.2	The tenderer will not be permitted to take advantage of any errors or omissions in the Tender. Should such errors or omissions be discovered, the tenderer must notify Beyond Group.
4.	Cost of Preparation of Proposal	4.1	The tenderer shall bear any and all costs related to the preparation and/or submission of the proposal, regardless of whether the proposal was selected or not. Beyond Group shall not be responsible or liable for those costs, regardless of the conduct or outcome of the procurement process.
5.	Language	5.1	The proposal, as well as any and all related correspondence exchanged by the tenderer and the contracting Authority, shall be written in the English language.
6.	Documents Comprising the Proposal	6.1	The Proposal shall comprise of the following documents: a) Technical Proposal b) Financial Proposal c) Any attachments and/or appendices to the proposal.
7.	Technical Proposal Format and Content	7.1	The tenderer is required to submit a technical proposal using forms of their choice however adhering to the recommended form of the proposal as described in "Paragraph 5"
		7.2	The technical proposal shall not include any price or financial information. A technical proposal containing material financial information may be declared non-responsive.
8.	Financial Proposals	8.1	The financial proposal shall be prepared using the forms of choice. It shall list all major cost components associated with the services, as instructed in "Paragraph 5" of this Tender.
		8.2	Prices and other financial information must not be disclosed in any other place except in the financial proposal.
		8.3	The tenderer understands that fees provided in the financial proposal shall remain valid and cannot be increased for the entire validity of the Agreement.

9.	Currencies	9.1	All prices shall be quoted in US Dollars					
	C. SUBMISSION AND OP	ENING	OF PROPOSALS					
10.	Submission	10.1	Any requests for clarification shall be submitted to seechange@beyondrd.com by October 13, 2022					
		10.2	The tenderer shall submit a complete technical and financial proposal by email, to seechange@beyondrd.com					
		10.3	The Proposal shall be signed by the tenderer.					
11.	Form Of Submission	11.1	Proposal submission is only accepted through soft copy submission by email as follows:					
			a) Electronic files that form part of the proposal must be in accordance with the format and requirements indicated in Tender;					
			b) The Technical Proposal and the Financial Proposal files MUST BE COMPLETELY SEPARATE.					
			c) Please include the following in the subject of your submission email "SEE Change SESOs Capacity Building - <i>tenderer name</i> " submission					
		Subm	ission shall be sent to the following email: seechange@beyondrd.com					
12	2. Deadline for Submission of Proposals and Late	12.1	Proposals must be received by Beyond Group no later than October 20, 2020, at 17:00 Beirut Time					
	Proposals	12.2	Beyond Group shall not consider any proposal that is submitted after the deadline for the submission.					

SECTION 2 - TERMS OF REFERENCE

Paragraph 1 - Assignment Description

ASSIGNMENT CONTEXT AND BACKGROUND

SEE Change Consortium, formed of Oxfam, COSV, and Beyond Group (BG) is implementing the Social Entrepreneurship Ecosystem Change (SEE Change) project funded by the EU. The project focuses on Social Entrepreneurship (SE) as a tool to support local development and enhance social stability. The consortium aims to strengthen social enterprises (SEs) to respond to the social and economic situation in Lebanon and advance the legal and institutional framework for SE. Under the SEE Change project, consortium members will:

- 1. Provide tailored capacity development trainings for community members on SE
- 2. Develop a community-led accountability framework for SEs
- 3. Support community monitoring of the economic and social impact of SEs
- 4. Provide financial and non-financial support to SEs
- 5. Develop social justice incubation program for new Initiatives of social start-ups
- 6. Provide capacity development support to Social Enterprise Support Organizations (SESOs)
- 7. Strengthen the networking and knowledge exchange between SESOs
- 8. Support the existing networks working on SE
- 9. Support the legal and institutional framework for SE in Lebanon through technical expertise and advocacy actions

The component related to the SESOs aims at building the capacity of these structures and strengthening the networking and knowledge exchange between them. To do so, Beyond Group has conducted a needs assessment of a sample of SESOs, of different sizes, operating in various regions in Lebanon. The assessment identified key learning topics to focus on, in addition to recommendations for the implementation of the capacity building activities.

Accordingly, Beyond Group has developed a capacity building program targeting new and well-established SESOs in various regions in Lebanon, and which includes training, coaching, and exchange learning activities. The program covers a range of basic and advanced topics needed to develop the internal capacity of SESOs in order to improve their internal processes, enhance their support programs, and provide better services for social entrepreneurs.

Paragraph 2 – Scope of Work

REQUESTED SERVICES

Beyond Group seeks to contract a pool of experts in the training, coaching, and facilitation of the topics listed below to design and deliver the capacity building activities explained hereafter for SESOs to improve their technical, financial, legal, operational, and organizational capacities.



Торіс	Activities	Brief Description
Social Entrepreneurship in Lebanon		 Presentation of the capacity building program Alignment on SE definition Assessing SE models and objectives Challenges and needs in Lebanon The different business phases of SE Challenges and support needed at each phase
A collaborative community of SESOs	9	 Discussing the basis for a collaborative community of SESOs: the model, values, etc.
Sustainable and Impactful SE Modelling	3	 Innovation / Design Thinking Methods Needs Assessment Exploring alternative sources of revenue streams Defining the vision Stakeholder Engagement Ethical sourcing
Risk & Crises Management	Ø O	Risk Assessment & ManagementCrises managementPricing in times of crises
SE Scaling models	0	Growth potentialSustainable upscaling
Grant Management	0	Types of grantsThe grant management lifecycleFinancial management
Impact Fund Management	⊘ ⊕	 Designing an impact fund and raising capital Managing and marketing an impact fund Investment readiness of SEs Reporting to investors
Social Impact Identification		 What is social impact? Needs Assessment Defining and validating the problem Framing the social impact
Social Impact Measurement	Ø 3	 Social Impact Measurement Framework Approaches and processes Developing Assessment and

		 Communicating the social impact measured Integrating SDGs Monitoring & Evaluation Guidance on Framework Methods of verifications Useful tools
Proposal Writing	Ø B	 Grant Management, budget estimation Programmatic design (contextualized, participatory, inclusive, localized, needs basis)
International Market Access	Ø 8	 Overview of Market Access Analysis Identifying market needs Facilitation of access to new markets Legal registration and International Market Access Legal requirements and procedure Market Access Strategies
E-Commerce		 Benchmarking and using e-commerce platforms Analyzing e-commerce results and insight Techniques to increase e-commerce sales High level information needed to guide SEs Exporting via e-commerce

The capacity building program will strictly cover the previously listed topics, noting that each topic's content outline is subject to amendments based on the experts' approach, expertise, and experience and in coordination with Beyond Group. The expert will ensure that the learning outcomes are useful for the SESOs to apply internally as well as to provide better support to SEs.

- Each expert can choose the scope of work to cover (all topics or a selection of topics), based on their capacities and knowledge
- Each expert can deliver one or more training topics listed above.
- A few topics include the delivery of a training workshop followed by coaching sessions. These should be conducted by the same expert.

The expert should work on the preparation, the delivery, and the reporting of the below activities, under one or multiple topics from the table above. The activities should take into consideration the project's overall objectives, with specific focus on social entrepreneurship targeting local communities and refugees, in particular women and youth. The expert is required to coordinate closely with Beyond Group during the preparation and implementation.

All deliverables listed below must be submitted in English. The delivery of the training and coaching sessions should preferably be in English. However, they could be delivered in Arabic, depending on the participants' preference.

1. TRAINING WORKSHOPS

- The contracted expert will be delivering a training workshop on the selected topic(s) to a group of 20 to 25 representatives of SESOs,
 - Identifying knowledge, skill, and capacity gaps

- Designing the workshop material and content (manuals, presentation, exercises, tools, etc.) based on the knowledge assessment and capacity gaps, and sharing it with Beyond Group team
- Assessing the knowledge of the participants before and after the training
- Facilitating training workshops and adapting to arising needs and challenges
- Evaluating the participants' satisfaction and gathering feedback
- Writing a brief report (up to 5 pages, excluding annexes) mentioning (but not limited to) the training delivery approach, challenges, evaluation, and recommendations.
- The training should take the form of highly interactive and participatory workshops and include theoretical knowledge transfer as well as applied learning techniques such as: practical exercises, case studies, group work, simulation, etc.
- The duration of the workshop can vary from **1 to 3 days**, depending on the topic.
- The training workshops will preferably be held in person in Beirut, except advised otherwise in the case of security or health risks.
- The outreach to SESOs, as well as the training logistics and budget will be handled by Beyond Group.

Deliverables for each training workshop (per topic)

The contracted expert will be expected to deliver the following deliverables in line with the respective scope of work described above.

- Detailed concept note, including material outline, approach, and methodology, submitted two weeks before the agreed training date
- Training materials (manual/ ppt/ handouts/ etc.), submitted one week before the agreed training date
- Knowledge assessment (pre/post-tests)
- Satisfaction survey
- Training report including a description of the delivered activities, challenges and lessons learned, recommendations, assessment of the knowledge improvement and satisfaction of participants.

2. COACHING SESSIONS

- Conducting one-on-one coaching sessions delivered to one or more representatives from each SESO participating in the trainings (up to 40 coaching sessions per topic) to respond to specific learning needs. This activity includes:
 - Identifying knowledge, skill, and capacity gaps
 - Preparing the material, tools, and exercises needed to guide the participants
 - Coordinating with the participants for the delivery of the coaching sessions
 - Delivering the coaching sessions and adapting to arising needs and challenges
 - Writing a brief report summarizing the sessions with each participant (location, duration, discussed topics, agreed decisions) and mentioning (but not limited to) the challenges faced and recommendations.
- The coaching sessions are usually following a training workshop and delivered by the trainer as a continuity of the workshop.
- Each coaching session can last up to 2h per SESO. This can be split in 2 different sessions if needed.
- The coaching sessions can be conducted **online or in-person**, depending on the needs, as agreed between the coach and the participants, and as advised in the case of security or health risks.
- The coach could give the SESOs preparations between the sessions, provide further readings, resources, and tools, or advise them to shadow another SESO.

Deliverables for the coaching sessions (per topic)

The contracted expert will be expected to deliver the following deliverables in line with the respective scope of work described above.

- Session summary including location, during, discussed topics, agreed next steps, etc. This should be signed by the
 participants.
- Coaching report including a description of the delivered activities, challenges and lessons learned, recommendations, assessment of the knowledge improvement and satisfaction of participants. This can be combined with the training report mentioned above.

3. MEET-UPS

- Conducting up to 4 learning exchange events with local, regional, and international experts and SESOs. This activity includes:
 - Identifying knowledge and content to be covered
 - Identifying relevant local, regional, or international experts or SESOs to participate in the session
 - Preparing the agenda and material needed for the session
 - Facilitating the session and adapting to arising needs and challenges
 - Writing a brief report summarizing the session including (but not limited to) the flow of the sessions, the
 participants, the topics discussed, the learning outcomes, etc.
- The meetups' topics are complementary to a specific training workshop.
- The duration of the session can vary from 2 to 4 hours, depending on the topic.
- The meetups will be online to allow for the participation of international experts and SESOs.
- The outreach to local SESOs will be handled by Beyond Group.

Deliverables for the meet-up session (per topic)

The contracted expert will be expected to deliver the following deliverables in line with the respective scope of work described above.

• Session report including a description of the delivered activity, challenges and lessons learned, recommendations, the knowledge shared and the satisfaction of participants. This can be combined with the training report mentioned above.

KNOWLEDGE AND TOPIC EVALUATION

The expert should assess the SESOs' knowledge and capacity after each topic is delivered and can cover the different activities per topic (such as training and coaching). The assessment can be in the form of pre- and post- assessment forms as well as observations and feedback from the expert.

In addition, the expert should ask the participants to evaluate the organization and delivery of each topic, for feedback and enhancement of the program by

- Designing and dispersing a satisfaction survey by end of each workshop
- Filling attendance sheets across workshops, coaching sessions, and meetups in alignment with the segregation required and communicated prior to the onset of the activities expected deliverables

TIMELINE

The first session "Social Entrepreneurship in Lebanon" is a mandatory introductory session for all SESOs that will participate in the program, to understand relevant components and challenges and align on the objectives of the program and ensure delivering on the outcomes.

The remaining capacity building activities are optional and the SESOs will be able to choose the topics that are most interesting and useful to them.

The training workshops will be phased out with at least 2 weeks between each session to allow for maximum participation.

The below shows a tentative timeline for the different activities, considering official national holidays:

		Duration	Nov/2	2022	Dec/2022					
Topic	Format	(days)	W 21	W 28	W 05	W 12	W 19	W 26		
Social Entrepreneurship in Lebanon	Training	1								
A collaborative community of SESOs	Meet-up	0.5								
Sustainable and Impactful SE Modelling	Training	2								
Sustainable and impactful SE Modelling	Coaching	-								

		Duration	Jan-2023				Feb-2023				Mar-2023		
Topic A	Activity	Activity (days)	W 09	W 16	W 23	W 30	W 06	W 13	W 20	W 27	W 06	W 13	W 20
Social Entrepreneurship in Lebanon	Training	1											
SE Scaling models	Training	1											
Grant Management	Training	2											
	Training	2											
Impact Fund Management	Meet-up	0.5											
Social Impact Identification	Training	2											

		Duration	May-2023					Jun-2023					Jul-2023			
Topic	Activity	(days)	W 01	W 08	W 15	W 22	W 29	W 05	W 12	W 19	W 26	W 03	W 10	W 17	W 24	
Social Impact	Training	2														
Measurement	Coaching	-														
Risk & Crises	Training	1														
Management	Meet-up	0.5														
Droposal Writing	Training	1														
Proposal Writing	Coaching	-														
International Market	Training	1														
Access	Meet-up	0.5														
E-Commerce	Training	1														

Paragraph 3 – Duration of Work

The full implementation of the described activities is planned to be carried out from **November 2022** through to **August 2023**.

The total duration of the assignment is estimated at 11 months, the tenderer is expected to confirm availability for the selected topic(s), as stated in the above schedule, **no later than 3 days from receiving a positive reply** regarding their offer.

Paragraph 4 – Qualification of Successful Expert

EXPERTS

The contracted expert shall provide the adequate time allocation and efforts, to efficiently complete the activities required under the scope of this assignment.

QUALIFICATION CRITERIA OF THE EXPERTS

- At least 10 years of experience in the design and facilitation of training workshops, one-to-one coaching sessions, and learning exchange sessions.
- Knowledge of principles and methods for curriculum and training design, training delivery for individuals and groups, and the measurement of training effects.
- Thorough knowledge regarding social entrepreneurship is a must; knowledge of the sector contextualized to vulnerable communities (such as refugees, women, youth) is an asset.
- Previous experience working with Social Enterprise Support Organizations.
- Proven analytical skills and ability to conceptualize and write concisely and clearly.
- Relevant experience in the MENA region is essential; experience in Lebanon and knowledge of the local SE ecosystem is an asset.
- Excellent writing and oral communication skills in English. Knowledge of the Arabic language is an advantage.
- Familiar with online training and collaboration tools and platforms (e.g.: Zoom, Mural).

In addition to the above, each expert should meet the qualification criteria listed below based on the topic that he/she will deliver:

Topic	Related qualifications
Social Entrepreneurship in Lebanon	 A thorough understanding of social entrepreneurship as a discipline Extensive knowledge of the local and regional ecosystem Extensive knowledge of the submitted SE legal framework in Lebanon Recollection of various social enterprises in Lebanon and the region
2. Sustainable and Impactful SE Modeling	 Extensive Knowledge of sustainable and impactful SE business models Strong recognition of the uniqueness of sustainable business models and relevant business activities in comparison to traditional models Experience in designing for impact in multiple industries Extensive knowledge of the submitted SE legal framework in Lebanon
3. Risk & Crises Management	 Experience in conducting risk analysis exercises A sufficient knowledge of designing activation protocols, addressing an SE chain of command and center plan, and creating effective risk management action plans Proven ability to share risk management best practices and catering them to each SE
4. SE Scaling models	 Experience in building scalable business models and/or best measures in scaling SEs A deep knowledge of optimal business scale up models A well-rounded understanding of optimizing capital management, investments, labor, and services for scale up Extensive knowledge of the submitted SE legal framework in Lebanon
5. Grant Management	 Perceptive knowledge of accessing finance locally and in the region Experience in grants applications and coaching businesses in meeting grant requirements Familiarity with grant-management systems for SEs
6. Impact Fund Management	 A solid understanding of the investment and impact thesis A proven ability to navigate fund foundations and structure set up Experience in funds management and guiding financial principles

	 Possession of industry proven insights on the most optimal fund management approaches
7. Social Impact Identification	 A solid grip on designing for impact Ability to transfer best practices in impact identification, analysis, assessment and management Extensive knowledge of the submitted SE legal framework in Lebanon
8. Social Impact Measurement	 A solid understanding of different impact measurement frameworks and the ability to adapt them to the local context Experience in setting up and running impact measurement, KPIs and data collection, and relevant reporting/M&E frameworks Knowledge of SDGs and how to integrate them in impact measurement Extensive knowledge of the submitted SE legal framework in Lebanon
9. Proposal Writing	 Apprehension of successful proposal writing for SEs Experience in transferring best practices in design and budgeting activities crucial for quality proposal writing Technical knowhow of R&D and information presentation skills necessary for proposal development
10. International Market Access	 Extensive knowledge of determining the relevant applicable industry-specific regulations Experience in managing product compliance for international growth purposes Strong grasp on developing effective access to market strategies
11. E-Commerce	 Solid knowhow of e-commerce platforms set up and operation Experience in optimizing ecommerce business A good grip on multiple E-commerce marketing and sales schemes Ability to transfer knowledge on best practices in setting up and running E-commerce businesses in Lebanon, taking into consideration the SE legal status

Paragraph 5 - Recommended Presentation of Proposal

A technical proposal and a financial proposal are requested separately, the technical proposal shouldn't include any financial information and vice versa.

TECHNICAL PROPOSAL

- The technical proposal presents the methodology on how the tenderer will approach and complete the assignment. The tenderer is expected to elaborate on the Terms of reference and propose its technical proposal with a redefinition of deliverables and timeline as understood by him/her.
- A detailed CV of the training and coaching tenderers
- Samples of previous relevant work in the form of project abstracts/outcomes/briefings
- A detailed methodology and workplan showcasing the milestone/respective delivery dates
- A clear financial registration information of the consultant as an individual service provider including the MoF and any details that might be required for billing purposes, if applicable

FINANCIAL PROPOSAL

The Financial proposal shall include all costs to be incurred in the design and implementation of the scope of the work.

- The tenderer shall provide their financial proposal in a detailed breakdown form to include all costs related to the preparation and the delivery of each activity.
 - The breakdown should include an overall cost of the training activity per topic, including the conception, preparation, delivery, and evaluation of activities
 - The breakdown should account for specific costs per activity as well, by indicating hourly rates for the coaching activity separately per topic as well
- The tenderer shall propose a schedule of payment which synchronizes with the delivery of each, and the compensation will be covered for the upon full delivery of each of the following:
 - Submitting the training material, conducting the training and submitting the report (100% of the training per topic's fees)
 - Conducting the coaching sessions and submitting the report (100%)
 - Conducting the meetups and submitting the report (100%)

Paragraph 6 – Selection Criteria

The evaluation panel will first review each response for compliance with the mandatory requirements of this Tender. Failure to comply with any of the requirements contained in this Tender, including provision of all required information, may result in a response or proposal being disqualified from further consideration.

Each valid proposal will be assessed by an evaluation panel first on its technical merits and subsequently on its price. For this Tender, the weight allocated to the technical proposal is 80 % (i.e., 80 out of 100 points).

To be further considered for the financial evaluation a minimum score of 53 points is required. Only proposals with a score of 53 or more points in the technical evaluation will be financially evaluated (i.e. the financial proposal will be opened). For further details and the distribution of points kindly refer to table 1 below.

Table 1: Evaluation Criteria and Distribution of Points

CRITERIAS	Award criteria	Score up to	Max. Score			
Capability of tenderer to perform the	Specific experience in the field concerned, knowledge, experience, and delivery capacity as listed under the qualification requirements	35	40			
work/service required	Previous collaboration(s) with Beyond Group	5				
Quality / Understanding of	Meeting technical specifications (methodology, plan, frameworks, etc) OR Level of understanding of work/service required		40			
requirements	Ability to meet delivery dates OR Reliability of plan proposed	10				
Prices for	Clarity of the cost breakdown		20			
goods/work/services	Price proposal of Goods/Services in accordance with the request (best value for money)		- 20			
TOTAL MAXIMUM GENERAL SCORING						

Important Notice

Given that this is a split tender (i.e., open for multiple contracts), the applications for each training (per topic) will be ranked according to the highest quality to price ratio and those with the highest overall score will be awarded the contract for each of the topics. The tender allows for a minimum of 3 and a maximum of 5 training activities per each tendering expert.

SECTION 3 – INSTRUCTIONS TO TENDERERS (EXPERTS)

3.1 TENDER VALIDITY

Tenders shall remain valid for a period of 15 calendar days after the deadline for receipt of tenders.

3.2 ALTERATION OR WITHDRAWAL OF TENDERS

Tenderers may alter or withdraw their tenders by written notification prior to the deadline for submission of tenders referred to in Article 2. No tender may be altered after this deadline. Withdrawals must be unconditional and will end all participation in the tender procedure.

3.3 COMPLIANCE

Beyond Group reserves the right to reject all bids not submitted in the format specified and any bids where any of the required forms are not completed.

3.4 POWER TO ACCEPT PART OF A TENDER

Beyond Group reserves the right, unless the tenderer expressly stipulates to the contrary in the tender, to award batches separately or in any combination.

3.5 CONFIDENTIALITY

Tenderers must treat the invitation to tender and all associated documentation supplied by Beyond Group as confidential. Beyond Group guarantees that tender offers shall remain confidential till the contractual phase.

3.6 NOTIFICATION AWARD AND CONTRACT SIGNATURE

The successful tenderer will be informed in writing that their tender has been chosen (notification of award). Beyond Group will then agree with the selected tenderer on the final contract version. Within 7 working days following the reception, the successful tenderer will sign, date and send back the contract.

Note that the successful tenderer shall then confirm availability or unavailability within 3 days from the date of the notification of award. In case of non-availability, the contract on a certain topic will be awarded to the next most eligible tenderer.

The unsuccessful tenderer will be informed by e-mail within the 7 days following the award.