REAL ESTATE AND FACILITIES SERVICE

Open procedure for the provision of insurance services for the European University Institute

Ref: **OP/EUI/REFS/2026/001**

YEAR 2026

Contents

CHAPTER I – SCOPE AND DESCRIPTION OF THE PROCUREMENT PROCEDURE

Article 1. Definitions

'candidate' means an economic operator that has sought an invitation;

'contract' means a public contract awarded by the EUI for the procurement of services/supply;

'EUI' or 'the Institute' means the European University Institute, which is the contracting authority entrusting the services that are the subject of these tender specifications to the contractor;

'contractor' means to the successful tenderer awarded with the contract;

'economic operator' can refer to a 'work contractor', 'supplier', or 'service provider' and means any natural or legal person or public entity or group of such persons and/or entities which offers the execution of works, the supply of products or the provision of services on the market;

'joint tenders' means a situation where a *tender* is submitted by a group (with or without legal form) of economic operators regardless of the link they have between them. The group as a whole is considered a *tenderer*[1];

'subcontracting' means the situation where the *contractor* enters into legal commitments with other *economic operators* which will perform part of the *contract* on its behalf. The *contractor* retains full liability towards the *EUI* for performance of the *contract* as a whole;

'tender' / 'offer' defines the terms upon which the supplier is willing to be bound, which normally include price, date of delivery, payment terms and a description of the services/supplies/works;

'tenderer' means an economic operator that has submitted a tender;

'tender specifications (TS)' means any documents describing the needs and requirements of the EUI for the purposes of the relevant tender.

Article 2. Contracting authority

This procurement procedure is launched and managed by the *EUI*, that is the contracting authority for the purposes of this procurement procedure, through the **Real Estate and Facilities Service (REFS)**.

Article 3. Subject

Subject of the contract	The subject of this procurement procedure is the provision of **insurance services for the European University Institute**.
Lots	This procurement procedure is divided into the following **9 lots**: • **LOT A – All Risks Fine Art Insurance Policy** • **LOT B – All Risks Office Insurance Policy** • **LOT C – All Risks Apartment Insurance Policy** • **LOT D – All Risks Historical Archives Insurance Policy**

[1] References to tenderer or tenderers in this document shall be understood as covering both sole tenderers and groups of economic operators submitting a joint tender.

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<tr><td></td><td>

- **LOT E – Public Liability and Employers' Liability Insurance Policy (TPL/EL)**
- **LOT F – Directors, Statutory Auditors and Officers Liability Insurance Policy (D&O)**
- **LOT G – Business Travel Insurance Policy**
- **LOT H – Motor Third-Party Liability Insurance Policy**
- **LOT I – Professional Liability Insurance Policy**
- **LOT J – Cybersecurity Insurance Policy***

  *= to be activated only when the EUI will match the minimum requirements for being insured.

Tenders may be submitted for one or more lots. Each lot will be assessed independently of any other lot. *Tenders* which cover only part of one lot or are declared as being conditional on the award of any other lots are not permitted.
</td></tr>
<tr><td>**Type of contract**</td><td>

The procedure will result in the conclusion of a **single framework contract for each lot**.

Tenderers need to take full account of the provisions of the draft *contract* as the latter will define and govern the contractual relationship(s) to be established between the *EUI* and the *contractor*(*s*).
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<tr><td>**Duration of the contract**</td><td>

The framework *contract* to be awarded shall have a duration of **5 years**. The details of the initial *contract* duration and possible renewals are set out in Article I.2 of the draft *contract*.
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<tr><td>**Estimated value of the contract**</td><td>

The **estimated value of the framework *contract*** to be awarded for the whole duration of 5 years is **€761.500,00 (seven hundred and sixty-one thousand five hundred/00) thus divided per each lot**:

- **LOT A - All Risks Fine Art Insurance Policy**
  - **€ 18.000,00 (eighteen thousand/00)**
- **LOT B - All Risks Office Insurance Policy**
  - **€ 375.000,00 (three hundred seventy-five thousand/00)**
- **LOT C - All Risks Apartment Insurance Policy**
  - **€ 25.000 (twenty-five thousand/00)**
- **LOT D - All Risks Historical Archives Insurance Policy**
  - **€ 27.500,00 (twenty-seven five hundred thousand/00)**
- **LOT E - Public Liability and Employers' Liability Insurance Policy (TPL/EL)**
  - **€ 20.000,00 (twenty thousand/00)**
- **LOT F - Directors, Statutory Auditors and Officers Liability Insurance Policy (D&O)**
  - **€ 25.000,00 (twenty-five thousand/00)**
</td></tr>
</table>

	• **LOT G - Business Travel Insurance Policy** ○ **€ 100.000,00 (one hundred thousand/0)** • **LOT H - Motor Third-Party Liability Insurance Policy** ○ **€ 35.000,00 (thirty-five thousand/00)** • **LOT I - Professional Liability Insurance Policy** ○ **€ 11.000,00 (eleven thousand/00)** • **LOT J – Cybersecurity Insurance Policy** ○ **€ 125.000,00 (one hundred twenty-five thousand/00)**

Article 4. Conditions for participation to tender

If you are interested in this *contract*, you should submit a *tender* in one of the official languages of the European Union (with preference for the use of English) provided you comply with the conditions for participation to tenders as set out in Article 3.4 of President's Decision n. 24/2025 of 6 May 2025 implementing title V concerning procurement of the EUI's Financial Rules (Public Procurement Regulation), available for consultation at: https://www.eui.eu/en/public/about/procurement/tenders-regulatory-framework.

Article 5. Joint Tenders

Joint tenders are not allowed for this procurement procedure.

Article 6. Subcontracting

Subcontracting is not allowed for this procurement procedure.

Subcontracting to *subcontractors* identified in a tender that was accepted by the *EUI* and resulted in a signed contract, is considered authorised.

CHAPTER II – TECHNICAL SPECIFICATIONS

Article 7. Description of the technical specifications

The **services** that are the **subject of this procurement procedure**, including any minimum requirements, **are described in detail in Annexes I A, B, C, D, E, F, G, H, I**, complementing the present Annex I – Tender specifications.

CHAPTER III – EVALUATION AND AWARD CRITERIA

The evaluation of the *tenders* that comply with the submission conditions will consist of the following elements:

- Check if the *tenderer* has access to procurement (see Article 4);
- Verification of administrative compliance (if the *tender* is drawn up in one of the official EU languages and signed by duly authorised legal representative(-s) of the *tenderer*);

- Verification of non-exclusion of *tenderers* on the basis of the exclusion criteria;
- Selection of *tenderers* on the basis of selection criteria;
- Verification of compliance with the minimum requirements defined in the tender specifications;
- Evaluation of *tenders* on the basis of the award criteria.

The *EUI* will evaluate the abovementioned elements in the order that it considers to be the most appropriate. If the evaluation of one or more elements demonstrates that there are grounds for rejection, the *tender* will be rejected and will not be subjected to further full evaluation. The unsuccessful *tenderers* will be informed of the ground for rejection without being given feedback on the non-assessed content of their *tenders*. Only *tenderer*(*s*) for whom the verification of all elements did not reveal grounds for rejection can be awarded the *contract*.

The evaluation will be based on the information and evidence contained in the *tenders* and, if applicable, on additional information and evidence provided at the request of the *EUI* during the procedure. If any of the declarations or information provided proves to be false, the *EUI* may impose administrative sanctions (exclusion or financial penalties) on the entity providing the false declarations/information.

For the purposes of the evaluation related to exclusion and selection criteria the *EUI* may also refer to publicly available information, in particular evidence that it can access on a national database free of charge.

Article 8. Exclusion criteria

The *tenderer* must not be in one of the exclusion situations listed at the following link: https://www.eui.eu/Documents/ServicesAdmin/ProcurementattheEUI/Exclusion-criteria.pdf

- ➢ Each *tenderer* must declare that it is not in one of the exclusion situations listed in the link mentioned above by signing Annex II A - Declaration on Honour.

The *EUI* reserves the right to verify, may it be deemed appropriate, the information and to request further supporting evidence to the successful tenderer prior to the signature of the *contract*.

Article 9. Selection criteria

General requirements:

The *tenderer* must have the following minimum requirements to perform the *contract*:

a) being compliant with obligations relating to the payment of social security contributions for workers, according to the current legislation, and application of employment conditions envisaged in the sector's national collective labour agreement;

b) being compliant with the current labour laws and regulations;

c) being compliant with the current health and safety laws and regulations;

d) being compliant with the current environmental laws and regulations;

Economic and financial capacity:

e) being in a stable financial position (financial viability) ➔ possession of 1 (one) bank reference issued by major banks or authorised dated after the invitation to the present invitation letter, in which it is shown that the *economic operator* has always met its commitments with regularity and punctuality and to be in possession of the economic and financial capacity to perform the services forming the subject of the *tender*;

f) to have a total annual gross written premium portfolio of the insurance company amounting to at least €30,000,000.00 (thirty million/00);

g) to have carried out, during the period 2020–2025, services similar to those forming the subject matter of the present procedure, with a total turnover over the five-year period of not less than €300,000.00 (three hundred thousand/00).

Technical and professional requirements:

h) being authorised to perform the *contract* under national law, as evidenced indicatively by inclusion in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, or entry in the value added tax (hereinafter 'VAT') register;

❖ **Evidence to be submitted with the tender as part of Envelope n.1 – Administrative Documents (please, for more details on the submission process, see point 3 of the letter of invitation to tender):**

- a signed and dated Declaration on Honour available in Annex II A;
- 1 (one) bank reference;
- a document attesting that the *tenderer* has a total annual gross written premium portfolio of the insurance company amounting to at least €30,000,000.00 (thirty million/00);
- a document attesting that the *tenderer* has the carried out, during the period 2020–2025, services similar to those forming the subject matter of the present procedure, with a total turnover over the five-year period of not less than €300,000.00 (three hundred thousand/00).
- evidence that the *tenderer* is included in a trade or professional register, or a sworn declaration or certificate, membership of a specific organisation, or entry in the value added tax.

The *EUI* reserves the right to perform sample checks in order to verify the accuracy of the statements submitted by *tenderers*.

Tenderers that are not compliant with the applicable minimum requirements shall be rejected.

Article 10. Award criteria

Only the *tenders* submitted by *tenderers* meeting the requirements of the exclusion and selection criteria will be evaluated in terms of quality and price. The *contract* shall be awarded according to the "**most economically advantageous tender**" criterion **following the sole assessment of the lowest price offered** made by the competent evaluation committee which will assign a score to each *tender* to a maximum of 100 points, based on the following parameters:

MAXIMUM SCORE	
Financial evaluation (price)	100/100

The *tenderer* obtaining the highest score per each lot shall be awarded with the related *contract*.

The maximum points available for the price (P), per each lot, shall be 100 points to be assigned to the *tender* proposing the best price.

The other *tenders* shall be given scores (rounded to two decimal places, if necessary) proportional to the ratio between the best price offered and that offered by each *tenderer*.

$$P = 100 \times \frac{\text{Best price offered}}{\text{Price offered}}$$

P = points assigned to the *tender*.

The price considered for evaluation will be the total price of the *tender*, covering all the requirements set out in these *tender specifications*.

The *tenderer* shall submit a financial *offer* using the form Annex II B, selecting one or more lots to submit an offer to.

CHAPTER IV - FINAL PROVISIONS

Article 11. Requirements for the signature of the contract

The successful tenderer, within the date to be communicated by the EUI, must submit the following documents before the signature of the contract:

- a copy of the full criminal record of the legal representative of the successful tenderer;
- the non-disclosure agreement related to the protection of personal data as provided for by the applicable rules of the EUI Data Protection Policy, that will be provided in due time by the EUI to the successful tenderer.

  Please be aware that any employee of the successful tenderer who is involved in the implementation of the contract with the EUI must return to the contracting authority such agreement duly filled and signed.

Please note that should the successful tenderer fail to submit the documents outlined above in due time or, upon testing, is found not to be in compliance with the declarations submitted in the tender, the EUI reserves the right to award the contract to the following tenderer in the ranking or to launch a new call for tender.

Article 12. Contract management

For the *EUI*, the reference person(s) for the *contract* management is/are the following:

- the Director of the Real Estate and Facilities Service (REFS).

Article 13. List of tender documents

The tender documents of the present procurement procedure are composed of the draft contract, the invitation letter, these *tender specifications* - TS (Annex I) and the contractor's *tender* (Annex II), including the following annexes:

- Annex I A LOT A – All Risks Fine Art Insurance Policy
- Annex I B LOT B – All Risks Office Insurance Policy
- Annex I C LOT C – All Risks Apartment Insurance Policy
- Annex I D LOT D – All Risks Historical Archives Insurance Policy
- Annex I E LOT E – Public Liability and Employers' Liability Insurance Policy (TPL/EL)
- Annex I F LOT F – Directors, Statutory Auditors and Officers Liability Insurance Policy (D&O)

- Annex I G LOT G – Business Travel Insurance Policy
- Annex I H LOT H – Motor Third-Party Liability Insurance Policy
- Annex I I LOT I – Professional Liability Insurance Policy
- Annex I J LOT J – Cybersecurity Insurance Policy
- Annex II A – Declaration on honour
- Annex II B – Financial offer