



Bolszewo, November 22, 2017 r.

**Request for proposals for the performance of the research and development service within  
the project "LogPorta. Development and implementation  
of process innovation in optimization of production and logistics activities"  
(1/LogPorta/2017)**

**1. Ordering Party**

**1.1 Name and addresses**

PORTA KMI POLAND Spółka z ograniczoną odpowiedzialnością Spółka komandytowa with its registered seat in Bolszewo (84-239), 54 Szkolna street, Tax ID no. 5850006204, Statistical no. (REGON) 190542423.

Website address: [www.porta.com.pl](http://www.porta.com.pl).

**1.2 Communication**

Contact person:

Bartosz Gajewski, mail: [bartosz\\_gajewski@porta.com.pl](mailto:bartosz_gajewski@porta.com.pl), phone: +48 691 114 049

**1.3 The type of ordering institution**

A limited partnership

**1.4 The main object of business activity**

Manufacture of other builders' carpentry and joinery (Polish Classification of Business Activity no. 16.23.Z)

**2. Information on the procedure**

**2.1 The mode of conducted procedure**

This procedure is conducted on the basis of:

- a) art. 70<sup>1</sup> -70<sup>5</sup> of the Civil Code Act dated 23th April 1964 (Polish Journal of Laws no. 16, item 93, as amended),

- b) the principles of competition defined in *“The guidelines concerning the eligibility of expenses under the European Regional Development Fund, the European Social Fund and the Cohesion Fund for the years 2014-2020”*.

## **2.2 Order title**

Implementation of the research service within the LogPorta project.

## **2.3 Request for proposals no.**

1/LogPorta/2017

## **2.4 Tenders submission period**

22.12.2017 r.

## **2.5 The description of tender preparation and submission**

The tenders shall be drawn up in Polish or in English. The tender shall be developed using the tender form, attached as Appendix 1 (Polish version) or 2 (English version) hereto. If the Contractor attaches documents drawn up in a language other than Polish or English to the tender form, he should also attach a translation of this document into Polish or English.

One Contractor may submit only one tender. The tender shall be signed and stamped. **The concept of realization of the research service being the object of the contract should be attached to the offer.**

The price of the execution of order subject shall include all elements related to the correct and timely execution of the contract, in particular the cost of carrying out the research process, tests, simulations, production of the pilot installation, preparation and delivery of samples for verification and preparation and delivery of the final report.

The list of documents/ representations required from the Contractor

- 1) a filled in and signed tender form, attached as Appendix 1 (Polish version) or 2 (English version), in which he shall provide a declaration of compliance with all procedure participation conditions,
- 2) a concept of realization of the research service,
- 3) documents confirming the fulfillment of the condition of experience - a summary of the research services performed within 3 years before the deadline for submission of tenders in accordance with Appendix 9 (Polish version) or 10 (English version). The Ordering Party guarantees the right to demand the delivery of documents confirming fulfillment of the conditions of participation in the proceedings from each of the Contractors who will submit a valid offer,

- 4) a valid copy from the appropriate register or the central electronic register and information on business activity, if separate provisions require the entry into a register, issued not earlier than 6 months before the expiry of tender submission time limit. In the case of tender submission by a Contractor whose registered seat is outside the territory of the Republic of Poland, it is also necessary to submit a valid copy from the register of entrepreneurs. A power of attorney shall be attached to the tender, if the proxy of the person signing a tender cannot be deduced from the aforementioned copy or the certificate from the register of business activity, attached to the tender.

The tender shall be submitted by e-mail to the e-mail address specified above: bartosz\_gajewski@porta.com.pl, in a file protected from edition, e.g. pdf. By the deadline for submission of tenders, the Contractor may make changes to the submitted offer or withdraw it. Changes in the offer or its withdrawal should be provided in writing to the Ordering Party in pain of nullity to email address: bartosz\_gajewski@porta.com.pl before the deadline for submission of tenders. The change or withdrawal of the offer should include the additional sign "CHANGE OF OFFER" or "WITHDRAWAL OF OFFER".

The Contracting Party will make a formal evaluation and fulfillment of the conditions for participation in the procedure by the Contractors, who will submit the bids before the deadline. In addition, the Ordering Party will carry out an examination of the tenders for their conformity with the description of the subject of the contract. In the next stage the Ordering Party will evaluate the valid tenders in accordance with accepted scoring criteria.

## **2.6 Announcement category/ order type**

Category - services

Subcategory – research services

## **2.7 The manner of making public of the request for proposals**

The request has been made public by means of its publication on the website [rpo.warmia.mazury.pl/artykul/1387/zapytania-ofertowe-wnioskodawcow](http://rpo.warmia.mazury.pl/artykul/1387/zapytania-ofertowe-wnioskodawcow).

## **2.8 Information concerning order-related agreements**

The order is not subject to any agreement concerning government contracts.

## **2.9 Additional information**

The contract is implemented within a research and development project "LogPorta. Development and implementation of process innovations in optimization of production and logistics activities " for which the Ordering Party applies for a co-financing under the Regional Operational Program of the

Warmińsko-Mazurskie Voivodeship for the years 2014-2020 Measure 1.2: Innovative companies, Sub-measure 1.2.2: Business-to-science co-operation.

## **2.10. Supplementary orders**

The Contracting Party doesn't foresee the possibility of granting supplementary orders.

## **3. Object of the order**

### **3.1. Brief description of the subject of the order**

The subject of the contract covers the implementation of a research and development service (development activities) aimed at developing an innovative technology for automating the flow of products from the production area (plant located in Elk) to the sorting and ordering stage of customer orders (plant located in Nidzica). Under the agreement construction methods will be elaborated as well as models of innovative solutions, simulations and tests will be carried out. Moreover a pilot installation will be created.

### **3.2. Object of the order**

The objective of the order is the performance of development activities under the project "LogPorta. Development and implementation of process innovations in optimization of production and logistics activities".

### **3.3. Description of the object of the order**

The objective of the order is the performance of development works final result of which should be confirmation of the technology level used for creating a solution that can be implemented on the target system (already preparing for the level of the first production) in plants located in Elk and Nidzica. To this end, the following scope of work should be implemented:

- Indication of guidelines for the automation of product flow in Porta's production activities in the area of assembly production of wood-based joinery in Elk and further flow and handling of products in the process to the sorting stage that will take place in new division in Nidzica. These guidelines should take into account the possibility of limiting to the minimum necessary manual movements performed during product manipulation by the production staff. The solution in its assumptions should provide such functionalities as:
  - provide at least 4000 door leaves and 3000 wood door frames per day (at the production line in Elk receive at least 1 piece of product per minute),
  - providing access to every piece of product / order,
  - integration of the solution's control system with host system,
  - manipulation functions with the possibility of sorting of products, folding them into different carriers / pallet in accordance with defined criteria.

- Development of design foundations for innovative solutions necessary for demonstration in production activities to verify previously developed concepts. These foundations should be based on the use of such devices and systems as manipulators, robots (both in Elk and Nidzica) and automatic conveyors or stacking and racking systems (especially in Nidzica).
- Development of innovative models and test simulations in conditions reflecting operational conditions for their evaluation, which will result in the technical documentation necessary to build a pilot installation. At this stage, a simulation model of the solution based on the previously mentioned guidelines and construction foundations should be developed.
- Building a pilot installation for the developed solutions and testing them in the environment as a model of real-life conditions. The pilot line should contain at least 2 elements that will be applied in the target solution. These components should enable the functionality of the system relevant for the manipulation of the products to be tested. They can be a manipulator or robot for depositing products onto a transport carrier and retrieving them from the carrier and an element of the transport system as well.

Demonstration of a pilot line can take place either at the place of development by the service provider/ his headquarter or another place.

The Ordering Party reserves the right to take a participation in one research session of the pilot lane conducted within the date set with the Contractor. The costs of participation of designated representatives in the above-mentioned tests will be borne by the Ordering Party.

In addition, within the subject of the order, the Contractor will provide to the Ordering Party test samples and materials from the work carried out for the purpose of verifying the results on his own.

In addition, at the request of the Contractor, the Ordering Party will provide detailed technical data - Annex 3 (Polish version) or Annex 4 (English version) - covering information necessary for the implementation of the research service, including:

- Specification of input data for further development work on the proposed solution,
- Layout - a horizontal view developed by the Ordering Party in the framework of the current work on the proposed solution.

The above specification will be made available upon prior delivery by the Contractor of the completed and signed Confidentiality Statement. Forms of the statement are enclosed in Appendix 5 (Polish version) and No. 6 (English version). Completed and signed Statement must be sent in pdf file to [bartosz\\_gajewski@porta.com.pl](mailto:bartosz_gajewski@porta.com.pl). The requested documents will be sent immediately to the Contractor at his email address.

Results of the research and development works performed by the Contractor shall be communicated to the Purchaser in the form of a report which should contain at least:

- Information on the methodology and the course of research and validation of the results of research and development services performed, including information on the variants and parameters that were analyzed,
- Information about the results of the research and validation of the results of the research and development service, including confirmation or comments on the identified key elements or parameters to be assessed,
- Information about the demonstration line of the R & D service and the simulated processes, the scope of the tests and their results,
- The concept of target installation and recommendations on how it should be implemented by the Ordering Party at the first stage of production separately for the plant located in Elk and in Nidzica.

### **3.4. CPV code**

73000000-2 Research and experimental development services and related consultancy services

73120000-9 Experimental and research services

### **3.5. Information on the parts**

The Ordering Party shall not accept submission of partial tenders.

### **3.6. Information of alternative tenders**

The Contracting Party does not accept alternative tenders.

### **3.7. Information concerning options**

The Contracting Party does not accept options.

### **3.8. Order performance schedule**

Deadline for the final performance of the subject of the contract - until 31.03.2018.

### **3.9. Place of order performance**

The Contractor should fulfill the subject of the order at the place where the Ordering Party carries out his activity (Elk, Nidzica) or at Contractor's premises or at another place at his disposal.

## **4. Tender evaluation**

### **4.1. Evaluation criteria**

The Ordering Party shall evaluate and select the most advantageous tender for the performance of the subject of the order using the following evaluation criteria: price - 100%.

## **4.2. Scoring procedure**

The evaluation under the price criterion: the gross price for the execution of the order shall be taken into account for the comparison of tenders. If the price has been defined in other currency than PLN, the recalculation of the price with the view to comparison and selection of the most advantageous tender shall be performed using the average exchange rate of a given currency, announced by the National Bank of Poland as at the tender signature date. The manner of evaluation under the price criterion: The score for a given tender  $C = \frac{\text{The price of the cheapest tender}}{\text{Tender price}} \times 100$  points.

The price offered by the Contractor should cover the fulfillment of all the obligations of the Contractor described in the inquiry with attachments.

The price specified by the Contractor shall be given as gross value of the tender i.e. together with due VAT. If a tender has been submitted, whose selection will lead to formation and services in the scope of intra-community acquisition of goods, the Ordering Party, for the purpose of evaluating such a tender, shall add VAT to the price specified in it, which he shall be obliged to pay in accordance with binding provisions. The Contractor, by submitting the tender, informs the Ordering Party whether selection of the tender will lead to the Ordering Party's tax obligation, specifying a name (type) of goods or service the delivery or provision of which will lead to its formation and indicating their value without the tax amount.

The maximum score for tenders shall be 100,00. The score granted shall be determined with precision to two decimal places. The Ordering Party shall select the most advantageous tender on the basis of the highest C score.

## **5. Procedure participation conditions**

### **5.1. Procedure participation conditions**

#### Experience

Contractors who meet the following conditions are eligible for the contract: they have experience in the provision of R & D services and during the last three years before the deadline for submission of tenders, and if their duration is shorter - in this period, they realized minimum 3 services related to the subject of the order. The period of 3 years refers to the date of receipt of the object of the contract by the ordering party (the date of completion of the research service).

As services related to the subject of the order, it is to be understood research services including designing of transport systems, internal storage systems, and other systems related to industrial logistics and industrial intralogistics in the manufacturing industries especially such as woodworking, furniture and other related with wood, metal, machine and electrotechnical industries.

The compliance with this condition shall be verified in a formula complies/ does not comply on the basis of the submitted declaration, constituting an element of Tender Form - Appendix no. 1 (Polish version) or no. 2 (English version), and attached specification of services completed within 3 years before expiry of the time limit for submission of tenders (Appendix no. 9 – Polish version or no. 10 – English version). The Contractor may additionally attach the reference letters confirming the

performance of the indicated research services. These documents should be written in Polish or English, and if they were prepared in another language, their translation into Polish or English should be included.

#### R&D personnel

Contractors who meet the following conditions are eligible for the contract: they have R & D personnel capable of performing the contract.

The Contractor should have a R & D team consisting of at least the following specialists: automation engineer (minimum 2 persons). In addition, the Contractor should have at least 1 person with experience in managing R & D projects.

The compliance with this condition shall be verified in a formula complies/ does not comply on the basis of the submitted declaration, constituting an element of Tender Form - Appendix no. 1 (Polish version) or no. 2 (English version).

#### Condition of having the required technology

Contractors who meet the following conditions are eligible for the contract: they have (or are able to acquire) the technology required for the implementation of the project.

The Ordering Party recommends that the solution developed by the Contractor of the R & D service is based on generally available, non-proprietary technical and technological solutions. If the Contractor intends to use patented technology in its research activities, he should possess or acquire rights to this technology. Moreover, within the remuneration for the execution of the subject of the order, the Contractor will be obliged to transfer to the Ordering Party the right to use the above mentioned contract technology in accordance with §8 of the contract template constituting Appendix no. 7 (Polish version) and no. 8 (English version).

The compliance with this condition shall be verified in a formula complies/ does not comply on the basis of the submitted declaration, constituting an element of Tender Form - Appendix no. 1 (Polish version) or no. 2 (English version).

#### Additional conditions:

Minimum tender validity time - 60 days.

### **5.2. Exclusions**

The tenders shall be rejected if they are submitted after the expiry of the specified time limit, i.e. 22.12.2017; if the contents of the tender do not correspond to the contents of the request for proposals or if the tender does not comply with the conditions specified in the request for proposals.

The order cannot be awarded to any entities which are related to the Ordering Party either personally or by means of capital. Personal or capital relations shall mean mutual relations between the Ordering Party or the persons authorised to incur liabilities on behalf of the Ordering Party, or



the persons performing the activities related to the preparation and execution of the supplier selection procedure on behalf of the Ordering Party, and the Tenderer, which especially consist in: 1) participation in a company as a partner of a civil law partnership or a partnership, 2) holding at least 10% stocks or shares, 3) performing the function of a member of a supervisory or governing body, a proxy or a plenipotentiary, 4) being a spouse, a relative by blood or affinity in a straight line, a collateral second degree relative by blood or affinity, or remaining in a relationship of adoption, custody or guardianship.

With the view to demonstrating the lack of grounds for the exclusion of the Contractor from the procedure, each Contractor shall submit: the filled in and signed tender form, attached as Appendix 1 (Polish version) or 2 (English version), in which he shall make a declaration on the lack of grounds for the exclusion of a Contractor from the Procedure.

## **6. Additional information**

### **6.1 Agreement with the Contractor**

An agreement in the wording specified in Appendix no. 7 (Polish version) and no. 8 (English version) shall be signed with the Contractor who submits the most favorable tender. If a selected Contractor has a seat in Poland, the agreement shall be concluded only in Polish. If a selected Contractor has a seat in a country other than Poland, the agreement shall be signed both in Polish and English.

At the stage of signing the contract with the selected Contractor, the Ordering Party allows for a possibility of the introduction of the contents of this document minor changes of a formal nature, not affecting the conditions of performing the contract, in particular arising from tax law, errors of translation, editorial, etc.

### **6.2. Terms of contract amendments**

The terms of the contract amendment are specified in the contract template, which constitutes Annex no. 7 (Polish version) and no. 8 (English version).

The Contracting Party shall provide for the possibility of amending the Agreement in relation to the contents of the Contractor's offer by means of a written annex. Amendments may concern:

1. changes in the Contractor's remuneration resulting from the amendment of the law, including provisions on the rate of VAT,
2. changes in the manner of realization of the object of the Agreement,
3. amendments to specify the content of the Agreement if the need for their introduction results from differences or ambiguities in the Agreement that can not be removed in any other way and the amendment will enable the discrepancy to be clarified and clarification of the Agreement in order to unequivocally interpret its provisions,
4. lack of availability of the offered object of the Contract or its part (eg. due to termination of production or withdrawal from the market) - the possibility of providing another object of the

Contract or a part thereof with parameters at least equal to or better than those set out in the Agreement,

5. necessity of realization of the object of the Agreement by applying other technical / technological solutions than indicated in the Agreement, if the application of the provided solutions threatens to default or malfunction of the object of the Agreement,
6. a change that does not lead to a change in the nature of the Agreement when the following conditions are met:
  - the necessity of amending the Agreement is due to circumstances which the Ordering Party, acting with due diligence, could not foresee,
  - the value of the change does not exceed 50% of the contract value originally specified in the Contract,
7. change of the Contractor, to which the ordering party awarded the contract, to a new contractor:
  - as a result of merger, division, transformation, bankruptcy, restructuring or acquisition of the existing Contractor or his company, provided that the new contractor fulfills the conditions for participation in the proceedings and this does not entail other substantive amendments to the Agreement,
  - as a result of the Ordering Party's assumption of the Contractor's obligations towards its subcontractors,
8. changes which do not change the nature of the Agreement when the total value of the change is less than EUR 209 000 and at the same time it is less than 10% of the contract value originally specified in the Agreement,
9. non-essential changes, whereby a non-significant change is understood to mean a change that does not change the general character of the Agreement in relation to the nature of the Agreement in its original form and none of the following:
  - changes introduce conditions that, if they were in the contract award procedure, in the procedure would have participated or would have been able to participate other contractors or in the procedure other offers would have been accepted,
  - the change violates the economic balance of the contract in favor of the Contractor in a manner not originally anticipated in the Agreement,
  - the change significantly extends or decreases the scope of benefits and obligations under the Contract, or consists in replacing the Contractor to whom the Ordering Party awarded the contract, the new contractor, in cases other than those specified in point 7.

### **6.3 Principles of settlement of remuneration**

The contract will be signed by the Contractor, who will submit the most favorable offer, for realization of the object of the contract. Within 14 days from the date of signing the contract, the Ordering Party will provide the Contractor with an advance payment of 50% of the remuneration. The remaining 50% of the remuneration will be paid to the Contractor within 14 days of signing the

acceptance protocol of the subject of the contract. Detailed provisions on how the remuneration will be paid are included in §4 of the contract template (Appendix No. 7 - Polish version and No. 8 - English version).

#### **6.4 The selection of the most advantageous tender and closing the procedure**

The Ordering Party shall select the most advantageous tender or he shall decide about the termination of the procedure within 50 days from the deadline for the submission of the offers. The Contractors shall be informed about the results of the procedure by e-mail. The Contracting Party shall inform the Contractor about the procedure of signing the agreement in a separate letter/ by e-mail. If the Contractor who has submitted the most advantageous tender does not sign the agreement, the Ordering Party shall have the right to invite another Contractor who has submitted the second most advantageous tender to sign the agreement, and if he also refuses to sign it, the Ordering Party shall have the right to invite the next Contractor with the highest evaluated tender.

### **7. Reservations**

#### **7.1. The Ordering Party reserves the right to:**

- a) recall the procedure, terminate it in whole or in part at any time without specifying the reason,
- b) terminate the procedure without selecting the tender,
- c) requesting the Contractors to submit additional explanations and documents confirming the content of the submitted offer,
- d) correct obvious written, accounting or other errors (including the ones that lead to the amendment of the tender, upon a written consent granted by the Contractor),
- e) extend the period in which the most favourable tender will be chosen. Should this be the case, the Ordering Party shall inform all Contractors about extension of the period in which submitted tenders are evaluated,
- f) refer to Contractors with a request to express a consent to extend the validity time limit of tenders submitted by them,
- g) amend the request for proposal before the expiry of tender submission date. In such a case, the Ordering Party shall immediately inform the Contractors about the amendment of the request for proposal. If as a result of the amendment of the request for proposal it is necessary to obtain additional time for the introduction of appropriate amendments in the tenders, the Ordering Party may extend the tender submission time limit by the time necessary for the introduction of such amendments and he shall inform the Contractors thereof as well as he shall place the information on the website on which the request for proposal has been published.

In the case of termination of the Procedure, the Contractors shall not be entitled to any compensation claims thereunder.

The Ordering Party does not plan any appeal procedure from the decisions of the Ordering Party, made during the Procedure.

## **7.2. The principles concerning the clarification of contents of the request for proposals**

The Contractors may apply to the Ordering Party for the clarification of the contents of the request for proposals, including the appendices. The Ordering Party shall immediately answer to any submitted questions by sending the contents of the questions and the answers to all Contractors (without specifying the source) and he shall place them on the website on which the request for proposals has been published.

The question shall be directed to the e-mail address [bartosz\\_gajewski@porta.com.pl](mailto:bartosz_gajewski@porta.com.pl). The Ordering Party foresees the possibility to amend the request for proposals before the expiry of tender submission date. In such case the Ordering Party shall immediately inform the Contractors of the amendment of the request for proposals. If as a result of the amendment of the request for proposals it is necessary to obtain additional time for the introduction of appropriate amendments in the tenders, the Ordering Party may extend the tender submission time limit by the time necessary for the introduction of such amendments and he shall inform the Contractors thereof as well as he shall place the information on the website on which the request for proposals has been published.

## **8. Appendices**

1. Tender form – PL
2. Tender form – ENG
3. Technical data on the subject of the order /available at the request of the Contractor/ – PL
4. Technical data on the subject of the order /available at the request of the Contractor/– ENG
5. Confidentiality Statement – PL
6. Confidentiality Statement - ENG
7. Contract template – PL
8. Contract template – ENG
9. Specification of services completed within last 3 years - PL
10. Specification of services completed within last 3 years –ENG