

CALL FOR TENDERS

Synergies and clustering between maritime projects

(EASME/EMFF/2020/3.1.12)

EASME/2020/OP/0022

TENDER SPECIFICATIONS

Open Procedure

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Synergies and clustering between maritime projects

TECHNICAL SPECIFICATIONS

1.1 INTRODUCTION

The Executive Agency for Small and Medium-sized Enterprises (henceforth "EASME" or "the Contracting Authority")¹, acting under the powers delegated by the European Commission, is launching this invitation to tender for "Synergies and clustering between maritime projects" with the aim to provide a platform for exchange of information, best practices and synergies between EMFF funded projects in a structured way.

The call for tender is based on Regulation (EU) No 508/2014 of the European Parliament and of The Council of 15 May 2014 on the European Maritime and Fisheries Fund and repealing Council Regulations (EC) No 2328/2003, (EC) No 861/2006, (EC) No 1198/2006 and (EC) No 791/2007 and Regulation (EU) No 1255/2011 of the European Parliament and of the Council² and, in particular, on the Commission Implementing Decision of 17.12.2019 concerning the adoption of the work programme for 2020 and the financing for the implementation of the European Maritime and Fisheries Fund, C(2019) 8977 final (action 3.1.12)³

1.2 BACKGROUND INFORMATION AND CONTEXT

The EMFF is the fund to support the EU's maritime and fisheries policies for 2014-2020. It is one of the five European Structural and Investment (ESI) Funds, which complement each other and seek to promote a growth and job based recovery in Europe. While about 89% of the EMFF is managed by EU Member States (so called "shared management"), 11% is managed directly by the European Commission (so called "direct management") through the launch of calls for proposals and tenders. Grants and contracts funded under the EMFF support EU wide objectives in maritime, and coastal affairs.

Calls for proposals launched by the European Commission under the EMFF, follow either a top down approach to investigate or solve a specific problem (i.e. the recyclability of fishing gear, support to the implementation of the Maritime Spatial Planning Directive) or follow a bottom up approach aiming to kick-start new ideas to support the goals of the maritime policy. The latter have been increasing in numbers as of 2016 where beneficiaries could submit proposals alone or in consortia. Evaluating insights from their results will increase their impact, enable a wider audience (businesses, local stakeholders, education bodies, public authorities) to be reached, and contribute to draw lessons in order to adjust, if necessary, and better frame future calls for proposals (Work Package 1).

However, the EMFF projects, to maximise their impact, should not be taken in isolation. They should be considered as part of a comprehensive and larger picture of other EU funding instruments which also support the maritime policy's goals.

Indeed, a high number of projects under Horizon 2020 (e.g. SME instrument/EIC pilot, Societal Challenge 2 and 5) LIFE, INTERREG, ERASMUS + etc. are also contributing to foster the blue

¹EASME was set up by Commission Implementing Decision (2013/771/EU) of 17 December 2013 establishing the "Executive Agency for Small and Medium-sized enterprises" and repealing Decisions 2004/20/EC and 2007/372/EC (OJ L 341 of 18.12.2013). EASME replaces and supersedes former Executive Agency for Competitiveness and Innovation (EACI).

²Official Journal of the European Union, L 149/1, 20.5.2014

³https://ec.europa.eu/fisheries/cfp/emff/annual-work-programme-grants-and-procurement_en

http://ec.europa.eu/dgs/maritimeaffairs_fisheries/contracts_and_funding/annual_work_programme/index_en.htm

economy. Incorporating a perspective on their experience, success factors and bottlenecks will give to the ongoing EMFF projects a wider vision and will contribute to further identify relevant synergies.

Drawing lessons and experience from such EU funding instruments and relevant funded projects will be a key role of the coherence panel that will intervene under this service contract under Work Package 3 (WP3) in a specific workshop where projects from other EU funding instruments will be invited to participate. The coherence panel will be composed of representatives of the European Commission, chosen by the Contracting Authority.

The role of the coherence panel will be to take an overall look at the EMFF projects considered under this service contract and point out duplications, potential collaborations and synergies.

The regional (sea-basin) dimension is another element to take into account when considering EMFF projects and when considering blue economy projects in general. A key aspect of the maritime policy is indeed to promote growth and development strategies of each EU large sea region. In this respect, a primary function of so-called “sea-basin assistance mechanisms” funded by the EMFF (Atlantic, West Med, and Black Sea assistance mechanism⁴) is to drive regional innovation and encourage bottom-up ideas in a given region (e.g. Atlantic Project Awards etc.). Better knowledge of the results of the EMFF bottom-up projects under direct management can also improve the effectiveness of these “assistance mechanisms” by allowing to better target their actions. Therefore, the sea-basin/geographical dimension of the EMFF projects will also be considered in a dedicated workshop under this contract (section 1.6.3, task 3.1).

Finally, increasing the EMFF projects visibility and networking opportunities is an important complementary element to increase their impact and effectiveness but also to inform on future programming and policy decisions. This aspect will also be part of this service contract under Work Package 2 and Work Package 3.

1.3 GENERAL AND SPECIFIC OBJECTIVES

EASME wishes to enter into a service contract to improve the effectiveness of bottom-up initiatives funded through calls for proposals and supported under the direct management of the EMFF fund.

The table below lists the calls for proposals that can be qualified as bottom-up and shall be part of the scope of the contract.

⁴ <https://atlanticstrategy.eu/>
<https://westmed-initiative.eu/>
https://ec.europa.eu/maritimeaffairs/policy/sea_basins/black_sea_en

year	Theme of the Call for Proposal	Nb of projects funded	Start year (indicative)	Budget € million per call for proposals
2015	Thematic routes for underwater heritage	3	2017	0.35
2016	blue labs: innovative solutions for maritime challenges	5	2017	1.70
	blue technology – innovative solutions for transfer to sea basin economies	3	2017	2.52
	blue careers for Europe	7	2017	3.45
	nautical routes for Europe	5	2018	1.50
2017	blue economy strand 1 new technologies	11	2018	7.96
	blue economy strand 2 marine litter	5	2018	2.00
	blue economy strand 3 networking in Mediterranean	5	2018	3.00
	blue economy strand 4 sustainability in Mediterranean	1	2018	1.50
	environmental monitoring of wave and tidal devices	2	2018	1.50
2018	blue economy strand 1 blue labs	6	2019	5.00
	blue economy strand 2 blue careers	8	2019	6.00
	blue economy strand 3 blue economy	12	2019	7.44
2019	blue economy window	10	2020	21.30
	environmental monitoring of ocean energy devices	1	2020	1,5
2020	blue economy window (to be published late 2020)	Approx. 10	2021	22.00

More details about individual projects, the beneficiaries, and their duration can be found on the EASME EMFF data hub⁵. Further projects resulting from ongoing and future calls for proposals will kick-off in 2020 and 2021 and will be integrated in the EASME EMFF datahub.

The general aim to be achieved with this contract is to set up and develop a process for evaluating and clustering EMFF financed projects from 2016 onwards.

The service contract will manage and animate a platform for structured exchange of information, mutual learning, greater visibility and cross-fertilisation between projects funded under EMFF.

This will have as main results:

- (1) a better understanding of factors that positively influence the success of projects supported by the EMFF direct management, as well as of bottlenecks (in order to inform and improve future processes for programming actions to be funded under EMFF through direct management).
- (2) mutual learning to enable projects to take advantage of insights and practices from other projects, including relevant similar projects funded by other EU funding instruments (i.e. Horizon 2020, LIFE etc.);
- (3) an increased visibility of EMFF projects.

The coherence panel's outlook on EMFF projects will complement the workshops that are planned under the networking activity (WP3) and the task of evaluation (WP1) and of clustering/visibility of projects (WP2).

⁵ <https://ec.europa.eu/easme/en/emff-projects> and <https://emff.easme-web.eu/>

1.4 TASKS

The services to be performed by the contractor will consist of three main Work Packages (WP) whose activities and tasks are briefly summarised here and more extensively detailed under in section 1.6.

- The first WP “evaluation” (WP1) will consist of an evaluation of a minimum 60 up to a maximum of 90 EMFF projects and will have two subtasks: defining indicators (task 1.1) and applying these indicators to get the evaluation results (task 1.2).
- The second WP “clustering/visibility” (WP2) will consist of creating thematic clusters of projects and produce materials on their results to enhance their visibility and enhance mutual learning
- The third WP “networking” (WP3) will consist of organisation of workshops to review results of the evaluation, exchange best practices and look for cooperation/synergies between projects from other programmes.

1.5 INPUT BY THE CONTRACTING AUTHORITY

For the preparatory work of the action and to be acquainted with EMFF projects, the contractor must take into account information presented on the EASME EMFF and Maritime datahubs⁶. EASME has in fact developed an interactive tool that generates information on EU funding.

If not found on the project websites, the contracting authority will provide relevant public deliverables from the EMFF projects at the beginning of the contract.

The contractor will receive guidance from EASME/the Commission on the content management system in order to manage and moderate a dedicated section in the Maritime Forum⁷.

The Maritime Forum aims to improve communication amongst EU maritime policy stakeholders. It allows parties interested in the EU maritime policy to communicate on a common platform. Users can publish events, documents and follow developments in their areas of interest. Information can be shared amongst a closed community or published openly. Anybody can register to the forum and comment on its content.

The content of the Maritime Forum can be arranged as a series of articles accessible from a home page and ‘daughter’ pages. Each “article” can be shared amongst a small community or made public (see Task 2.3 ‘user communities’). The contractor shall attend the weekly web-meeting with the European Commission where potential enhancements are discussed.

The Contracting Authority will provide the contractor with the names of the selected members of the coherence panel (European Commission representatives), referred to in WP3, at the beginning of the contract.

The Contracting Authority will give the necessary administrator rights to the contractor in order to be able to manage content on the relevant sections of the Maritime Forum⁸ (see WP2 task 2.3).

In addition, the contractor will receive guidance from the Contracting Authority as stipulated in the Work Packages described below (section 1.6).

1.6 GENERAL GUIDANCE ON METHODOLOGY

To meet the objectives mentioned in section 1.3, the contractor shall implement the tasks as described below.

The tenderers must explain how the tasks will be implemented and the work organised in order to provide the deliverables requested and meet the objectives of the contract.

⁶<https://ec.europa.eu/easme/en/section/easme-data-hubs>

⁷ <https://webgate.ec.europa.eu/maritimeforum/en>

1.6.1. WORK PACKAGE 1 (WP1): EVALUATION

The contractor must carry out an evaluation of the EMFF bottom up projects from the calls of proposals listed under section 1.3.

At the time when the new EMFF programming period for 2021-2027 is about to start, getting insights from these projects will be particularly relevant to identify success factors, reflect and take on board potential improvements as part of the programming process.

In 2019, an interim evaluation of the direct management projects funded under EMFF was carried out with focus on actions included in the 2014-2018 EMFF work programmes. At that time, projects from the 2015 and 2016 calls for proposals (approx. 16 projects) had just ended or were in their final stages of implementation while the bulk of projects (approx. 50 projects) funded under the 2017 and 2018 calls for proposals started respectively late 2018 and 2019 and were excluded from the evaluation.

This work package will allow complementing the interim evaluation by collecting insights from projects funded under the bottom-up calls that were not included in the scope of the previous interim evaluation mainly for timing reasons.

Details about the start and end dates of projects can be found in the EASME EMFF datahub.

The evaluation of these projects should be carried out in two steps:

- first by defining relevant indicators (Task 1.1 below) and
 - second then by applying the indicators to obtain the results of the evaluation (Task 1.2 below).
- The contractor shall evaluate a minimum of 60 up to 90 bottom-up projects funded under the EMFF calls for proposals listed under section 1.3 (general and specific objectives), based on a set of indicators. Some indicators have been already identified under task 1.1 below; other indicators to complete the list shall be proposed by the tenderers.

The contract will aim at evaluating all EMFF projects from the bottom-up calls or at least all those completed 4 months before this service contract ends.

Task 1.1: definition of indicators

In order to carry out the evaluation, the contractor shall define maximum four other relevant indicators to complete the list below to assess the results of projects from the listed calls for proposals.

In total, there should be up to eight indicators to measure parameters such as:

- the impact registered on the beneficiary such as improvements in Technology Readiness Level, intellectual property rights, revenue, commercialisation of project product etc...);
- sustainability of the project (will the project activities/results/products continue to be exploited after the end of the EU funded project?);
- scalability (Can a project be implemented in a larger scale? Can markets be found elsewhere?);
- uptake of results by other economic operators or organisations other than beneficiary;
- maximum 4 others to be defined by the contractor (for example: number of students with a placement/job at the end of the project for a blue career/blue lab etc.).

These indicators must be accompanied by descriptions of the targeted sector, type of beneficiary, type of activity and geographical area. A standard classification for these aspects will be provided by the Contracting Authority at the start of the contract.

Task 1.2: applying the indicators to get the results of the evaluation

The evaluation of each project shall include:

- ✓ A review of relevant project deliverables about core activities of the project (e.g. report on actual courses delivered for blue careers projects, prototype/demonstrators for blue economy projects, etc.) and project indicators where available;
- ✓ A summary of interviews with beneficiaries and third parties, where relevant. For multi-beneficiary projects, the contractor, wherever possible, will interview several beneficiaries. When not possible, it shall focus on the coordinating organisation. Minimum two interviews (including one with the coordinator) should take place for multi-beneficiary grants and minimum one for mono-beneficiary grants.
- ✓ A numerical score for each indicator and a justification for the score shall be provided.

The results of the evaluation can be provided in Excel or CSV format including three separate tables with the following information under separate columns as indicated below:

- ✓ project table
 - project_id⁹, budget year, project_acronym
- ✓ indicator description table
 - indicator_id, description of indicator
- ✓ indicator table
 - indicator_id, project_id, indicator_value, justification

DG-MARE will provide an IT tool that will allow the contractor to upload the indicators on the Maritime Forum in order to allow for feedback from the project beneficiaries and users.

The contractor shall evaluate a minimum of 60 and up to 90 projects, including most recent projects having delivered interim reports and deliverables by the time the evaluation is ongoing.

The contract shall have evaluated a minimum of 20 completed projects by the interim stage of this contract (12 months), and shall complete the evaluation of the remaining projects by the end of the project (24 months).

The tenderer should indicate in the offer how any potential conflicts of interest with coordinators/beneficiaries would be tackled.

⁹ Will be provided by the Contracting Authority at the start of the contract.

1.6.2. WORK PACKAGE 2 (WP2): CLUSTERING/VISIBILITY

The contractor will be responsible for increasing the visibility of EMFF projects resulting from the bottom-up calls (indicated under the table in section 1.3) with a view to facilitate exchange of information, mutual learning and cross-fertilisation between projects. To this end, the contractor will perform the following activities divided in three tasks: Task 2.1, Task 2.2, and Task 2.3.

Task 2.1: engage with projects coordinators and group EMFF projects in thematic clusters

Under this task, the contractor will be responsible for contacting, mobilising, and engaging EMFF project coordinators and, where relevant, beneficiaries.

The objective of task 2.1 is to engage projects coordinators/beneficiaries regarding WP1 'evaluation' but also inviting them to provide relevant information about their project in order to acquire more visibility on the dedicated section of the Maritime forum. Relevant information would be used as raw material to produce content for web publishing under task 2.2.

Under task 2.1, the contractor will also seek to mobilise coordinators/beneficiaries to participate to the workshops under WP3 and provide feedback on the workshops.

The contractor will propose relevant thematic clusters for groups of EMFF projects with common traits with a view to facilitate and foster cooperation, networking, mutual learning, identification of lessons learnt.

Thematic clusters shall not simply reflect and reproduce the titles of calls for proposals. They shall include projects with common traits across calls for proposals (cross-cutting or thematic issues). It is expected that a range of 10-12 projects could be included under each thematic cluster.

The tenderers shall propose in their technical offers the most appropriate working method to define the thematic clusters of projects including their estimated number and size.

An initial list of potential themes for the EMFF clusters of projects shall be submitted with the offer while an updated list will be submitted in the inception report as described further under section 1.10.2.

The list of thematic clusters with identification of relevant projects must be submitted for the Contracting Authority's approval within two months from the start date of the contract.

Task 2.2: Develop content for web publishing:

Following identification of the thematic clusters, the contractor will produce content information (in a format ready to be published) about each thematic cluster and about projects populating them including:

- articles featuring success stories/interviews, policy summaries (where appropriate) and news about relevant project activities and results;
- social media content for dissemination on DG MARE or EASME social media accounts;
- links to events/news relevant to the cluster as a whole;
- summary of the results of the evaluation performed under WP1.

Task 2.3 Web publishing on the Maritime Forum

The European Commission will allocate space on the Maritime Forum¹⁰ that the contractor can customise and feed with information. Examples of how the information will be published (style, graphic, presentation of content) can be found on the BlueInvest¹¹ and EU4Ocean¹² pages.

¹⁰ <https://webgate.ec.europa.eu/maritimeforum/en>

The content will also provide links to information available on EASME's website (e.g. news, articles, events etc.) including the data hub¹³.

The contractor will create an EU account first to have access as a user to the Maritime Forum content (which can be done from the Maritime Forum website). At the start of the contract, the Contracting Authority will give the necessary administrator rights to manage content on the relevant sections by the European Commission.

The section to be managed by the contractor on the EU Maritime Forum should act as a gateway to make all the necessary information and activities of the projects accessible. The set-up of the Maritime Forum is such that it is aimed at user communities. The bottom-up EMFF projects will be considered as a community. Access to content can be for members of the community only or made public. A strong preference should be given to making information open to all.

The contractor will perform the following activities under this task:

- design, develop, maintain and manage a section on the EU's Maritime Forum (<https://webgate.ec.europa.eu/maritimeforum/>), to ensure a dynamic and interactive environment for the clustering and networking of projects;
- allow for consultation, feedback, comments, from projects and their associated stakeholders from each cluster at relevant periods (e.g.. workshop, etc.);
- function as the registration tool for the stakeholders who wish to participate in the various workshops (see task 3). Specific registration services could be used externally, as long as they are accessible through links on this section of the Maritime Forum and as long as the relevant information on the events (including programme, presentation, outcomes, etc.) are also on the Maritime Forum;
- monitor and assess the usage of the website.

The contractor is expected to act in a timely fashion in updating content for which he is responsible on the EU Maritime Forum and for providing feedback to questions regarding workshops' participation, etc. Activities under this contract shall be widely advertised also through other online sources and any other relevant channels.

The section on the EU Maritime Forum must be operating within 3 months of the start date of the contract.

👉 All Commission websites, tools and online applications that are hosted on the europa.eu domain shall respect the rules, guidelines, templates and legal provisions outlined in the Europa Web Guide and the use of EC visual identity. For full details on the Commission policy for web publication, see: <https://ec.europa.eu/web-guide>.

1.6.3. WORK PACKAGE 3 (WP3): NETWORKING AND SYNERGIES

Under this task, the contractor shall organise workshops (in the form described within Task 3.1) and a final event to foster networking and cooperation among projects within a same cluster and among different clusters, in order to share experience.

The contractor will be responsible for the organisation of the workshops and related logistics, in close consultation and agreement with the Contracting Authority.

WP3 will include two steps described below under Task 3.1 and Task 3.2.

¹¹ <https://webgate.ec.europa.eu/maritimeforum/en/frontpage/1451>

¹² <https://webgate.ec.europa.eu/maritimeforum/en/frontpage/1482>

¹³ <https://ec.europa.eu/easme/en/emff-projects> and <https://emff.easme-web.eu/>

Task 3.1: Developing the content of the workshops/final event

A minimum of five virtual and five 'in person' workshops shall be organised over the duration of the contract in addition to one final event. Should it not be possible to organise presential events during the contract implementation, the contractor shall plan for virtual events.

In principle, each workshop shall last half a day, while the final event will last one full day.

The following types of workshops shall be organised, ideally every semester:

- a. Virtual thematic clusters workshops: for projects coordinators/beneficiaries under each cluster to meet, network, explore potential cooperation and exchange best practices;
- b. Cross-thematic (relevant for several clusters) workshops: involving project coordinators/beneficiaries from various thematic clusters. The following topics for cross-thematic workshops are examples and may be adapted during the contract implementation (e.g. inception or interim stage) in agreement with the Contracting Authority, and the European Commission:
 - ✓ digitalisation;
 - ✓ financial engineering;
 - ✓ future business models – including the impact of COVID-19;
 - ✓ one to be suggested by the contractor.
- c. Workshops on the following topics:

1) Integration, scaling up and cooperation with other EU funding instruments: during this workshop, 'the coherence panel', (with representatives from the European Commission working on other relevant EU funding instruments), will be invited to share their views on the EMFF projects following a methodology to be defined by the contractor in its tender.

In addition to EMFF projects, the selected coordinators from relevant projects funded under other EU instruments will also be invited to participate to this workshop by the contractor in consultation with the coherence panel and the Contracting Authority. This workshop will seek a more efficient use of funds, by helping project partners sharing experience, best practices and by building on lessons learnt from other EU funding instruments (LIFE, Horizon 2020/Horizon EUROPE, INTERREG, ERASMUS+, etc).

A summary of the conclusions of the coherence panel will be published as part of the final report at the end of the contract.

2) Sea-basin cooperation/geographical dimension: during this workshop, representatives from the sea basin 'assistance mechanisms' and representatives from the European Commission will be invited to share their views and discuss the role of sea-basin/geographical dimension of EMFF bottom up projects.

In addition to the workshops, the contractor will organise:

- d. a final event of maximum one day to:
 - to present the results of the evaluation carried out under task 1 and collect feedbacks;
 - to take stock of lessons learned in the previous workshops.

The workshops and the final event will build on the experience, backgrounds and exchanges with beneficiaries and results of WP1 where possible (e.g. interviews) to draw conclusions on matters such as:

- ✓ areas where more (non-financial) support is needed;
- ✓ administrative bottlenecks;
- ✓ helpful and auspicious measures from EU or national authorities (both those already in place and those wished for);
- ✓ synergies with other EU funding instruments;
- ✓ usefulness of sea-basin strategies and their assistance mechanisms in identifying challenges and opportunities;
- ✓ recommendations for future policy developments.

The tenderer should submit in its offer an initial list of topics for the workshops, (including the number of thematic cluster workshops, the size in term of participants and timetable), while an updated list will be submitted with the inception report as described under section 1.10.2.

The contractor will engage continuously with the participants before and after the workshops (see task 2.1) through the dedicated section on the Maritime Forum.

Task 3.2: Practical organisation of workshops/final event

As mentioned under task 3.1, workshops (except for the final event) may be virtual or in person. In case the workshops will take place in person, they shall be held in Brussels outside the EC premises; the contractor shall also ensure the possibility to follow the event remotely, for those who cannot attend the workshop physically.

The workshops will be in English without interpretation services.

The number of participants shall be approximately 25-30 people for each thematic workshop. The number of participants targeted for the final event is around 60.

The contractor will be responsible for:

- sending 'save the dates' to participants and manage invitations including invited speakers where relevant;
- developing a draft agenda in close collaboration with the Contracting Authority and the European Commission;
- suggesting speakers (where relevant), in close collaboration with the Contracting Authority and the European Commission, manage the related invitations and logistic (for presentational events);
- advertising the events widely, including on the relevant section of the EU Maritime Forum;
- registration;
- provide appropriate means to consult stakeholders, gather their feedback at the events (i.e. online questionnaires, interviews).

Brief workshop summaries will be submitted for each workshop as well as for the final event. They will be submitted to the Contracting Authority at the latest two weeks after the event has taken place.

Those summaries will include the list of participants, the agenda and a summary of the main items for discussion (including a clear indication of items that were identified as requiring follow-up or further work). For 'in person' workshops, the contractor must be responsible for:

- finding and booking the venue (ensuring its full equipment according to the needs);
- providing water throughout the workshop and coffee break(s) at the beginning of the workshop;
- for the final event, it shall also provide a coffee break in mid-session, and a standing cold meal lunch (e.g. snacks, sandwiches);
- ensuring whatever it takes for the remote connection for those who cannot participate physically (e.g. video-links).

The contractor will also be responsible for any other activity before or during the workshop, which is needed for its smooth implementation, including trouble-shooting in the event of unexpected problems.

The locations, agenda and list of speakers will be agreed with the Contracting Authority before each workshop and the final event. The workshops/events could take place, for example, alongside with other relevant EU events.

In case of presential events, the contractor will be responsible for the travel and accommodation expenses of potential invited speakers. These expenses shall be included in the price of the offer. No reimbursement will follow separately. A maximum range of 5-7 invited speakers is expected over the whole duration of the contract.

Participants will not be paid or charged for attendance. For EMFF projects still running during the implementation of this contract, the beneficiaries may charge accommodation and travel expenses linked to the events mentioned above, to the budget of their project.

The tenderer must include, in its offer, descriptions on how virtual workshops as well as the remote connection to the in person workshops will be organised and granted.

Tenderers must apply the European Commission “Guidelines on organising sustainable meetings and events at the Commission” https://ec.europa.eu/environment/emas/pdf/other/EC_Guide_Sustainable_Meetings_and_Events.pdf

The contractor is encouraged to reduce the environmental impact of events or meetings by: choosing venues easily accessible by public transport, proposing accommodation options in certified environmentally friendly hotels, proposing travel itineraries using carbon-offsetting flights or trains (instead of flights), proposing green catering (prefer plant-based food, opt for seasonal and organic food and drinks, avoid food waste and single use plastic, and provide reusable cups/bottles/glasses/cutlery/plates), pay attention to the management of waste and place displays to communicate the sustainable arrangements that have been put in place.

The contractor is encouraged to consider when it comes to small supply contracts to reserve the contract for sheltered workshops for disadvantaged persons, women, and long-term unemployed people.

1.7 PERFORMANCE AND QUALITY REQUIREMENTS

The following list shows the expected results in concise and approximate terms, to give a general idea of what will be requested from the contractor.

- indicators are defined and agreed with the Contracting Authority after 6 months (task 1.1) and draft tables are submitted (task 1.2);

- results of evaluation and subsequent updates are available with the interim report and final report (task 1.2);
- the thematic clusters are available and include all relevant EMFF projects (task 2.1);
- the section on the EU Maritime Forum is operational and provides all services as requested under task 2.3. and its usage is continuously monitored and assessed;
- the section on the EU Maritime Forum provides web content as of Month 3 of the contract and on a continuous basis until Month 24 ;
- all workshops planned have been organised and stakeholders' feedback and input collected ;
- workshop summaries are available on the relevant section on the EU Maritime Forum 2 weeks after the workshop took place;
- the final event has been organised and stakeholders' feedback and input collected for the final report recommendations.

The quantitative performance indicators that will be monitored to evaluate the performance of the contractor are:

- average number of participants at workshops, not including organisers (min. 25);
- Workshops'/final event satisfaction rate (target 75%), number of views of most popular page on the Maritime Forum (target 200).

Performance will be evaluated also against stakeholders' feedback collected from the workshops (e.g. task 3.2)

1.8 STARTING DATE OF THE CONTRACT AND DURATION

It is expected that the contract will be signed in the first quarter of 2021.

The contract shall enter into force on the date on which it is signed by the last contracting party provided both parties have already signed it. The duration of the tasks shall not exceed 24 months from that date. The execution of the tasks shall not start before the contract has been signed. The work will follow the timetable under section 1.10.

The contract may be renewed for 24 additional months depending on the future needs and on the budget availability, under the successor of EMFF programme.

1.9 VALUE OF THE MARKET

The estimated maximum amount for the execution of all the tasks referred to in this call for tenders is EUR 450 000 including all charges and expenses and excluding any renewals. No price quotation above this amount will be considered.

The estimated maximum amount for the possible renewal is EUR 450 000 including all charges and expenses. No price quotation above this amount will be considered. The price quotation for the possible renewal should strictly follow the rules as described under Section 3.7, Part E "Financial offer" of these tender specifications.

1.10 PLANNING, OUTPUTS AND DELIVERABLES

The contractor must provide the required deliverables in accordance with the conditions of the draft service contract (Annex 1). When requested in the contract the deliverables (interim and final report) will accompany the requests for payments.

All reports and documents must be drafted in English at CEFR¹⁴ proficient user C2 level and transmitted in electronic format compatible with Microsoft Word according to the indicative timetable specified below.

The final report and the corresponding executive summary must be of publishable quality (ensure proper grammar and language style), and provided in an electronic format compatible with Microsoft Word and in Adobe portable document format (.pdf).

1.10.1 Deliverables

- 1) List of thematic clusters and projects to be included for each cluster;
- 2) Draft indicators tables under (task 1.1 and 1.2) ;
- 3) Results of evaluation and interviews performed under WP1 ;
- 4) Workshop summaries and final event summary;
- 5) Material published on the Maritime Forum;
- 6) Recommendations from the coherence panel.

1.10.2 Intermediate outputs and deliverables

In addition to the deliverables listed in section 1.10.1 "Deliverables" the contractor must provide the following reports:

Inception report:

An inception report will be delivered within one month of the contract signature based on the draft work plan, which will be submitted by the tenderer with its offer.

The objective of this report is to refine and finalise the methodology outlined in the proposal made by the tenderer in its offer, as well as to provide an updated work plan including a description of each task, indicating key milestones, resources to be committed and an updated timetable for all the contract tasks (see section 3.7).

It will also include:

- An updated work plan indicating the resources to be used and the activities that are to be undertaken to achieve the objectives of the contract and implement the Work Packages specified in the tender specifications;
- Timeline and scheduling of tasks, in particular for the evaluation, publication of web material and organisation of workshops/final event;
- Templates for the progress reports and the interim report. (For graphic requirements, refer to section 2.1.5).

The inception report shall not exceed 20 pages, annexes excluded.

EASME will comment on the inception report within 30 calendar days.

Progress reports:

¹⁴ Level envisaged by the Common European Framework of Reference for Languages: Learning, Teaching, Assessment, abbreviated as CEFR. The CEFR describes language ability on a scale of levels from A1 for beginners up to C2 for those who have mastered a language. Information on the CEFR can be found on the Council of Europe website: http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp Self-assessment grids can be found at <http://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr>

To ensure the proper management and follow-up of the service contract, the contractor will be required to submit every six months (month 6, month 18 and 24) a concise progress report of the past six months of maximum 5 pages (annexes excluded) to the Contracting Authority, highlighting specifically the following elements:

- Short summary describing the status and the execution progress of the tasks;
- Issues affecting progress and corresponding corrective actions proposed.

The format of the progress report has to be agreed by the Contracting Authority as part of the approval of the inception report.

In addition to the progress reports, regular teleconferences or videoconferences shall be organised upon demand of the Contracting Authority or the contractor to discuss the state of play and exchange on pending issues.

Interim report:

The interim report shall follow the template accepted by the Contracting Authority as part of the inception report.

The interim report shall be submitted at the end of month 12.

It shall describe the progress achieved; follow-up actions for all tasks specified above and raise any problems encountered with sufficient information, to permit reorientation, if appropriate. The report shall also give clear indications and detailed planning of the work to be carried out per task during the rest of the contract period. The interim report shall not exceed 20 pages, annexes excluded. It will be accompanied by an executive summary of maximum 3 pages.

The interim report will include a draft template for the final report. (For graphic requirements, refer to section 2.1.5). It will include the following information:

- progress and challenges during the first part of the project and ways to overcome them.

The submission of the interim report will be accompanied by the following deliverables:

- 1) results of evaluation and interviews performed under WP 1 for the first 12 months;
- 2) workshop summaries for the first 12 months;
- 3) material published on the Maritime Forum web for the first 12 months;

The report shall also give clear indications and detailed planning of the work to be carried out during the rest of the contract period, for each task.

The report shall be accompanied by a request for interim payment (50% of the contract value). The Contracting Authority will process the interim report in compliance with the special conditions laid down in the service contract (Annex 1 - section I.5. Payment arrangements).

1.10.3 Final outputs and deliverables

Final report

The final report shall follow the template agreed with the Contracting Authority¹⁵ (as part of the interim report). It shall cover the entire work programme (its context, purpose, objectives and results) and include the draft findings, analysis, and factually based conclusions and recommendations in relation to the individual tasks as specified in the section 1.4 and 1.6 of these tender specifications. It shall take account of the comments made earlier in the process. It shall not exceed 25 pages, annexes excluded.

The submission of the final report will be accompanied by the following deliverables:

- 1) results of evaluation and interviews performed under WP 1 over the last 12 months;
- 2) workshop summaries over the last 12 months;
- 3) material published on the Maritime Forum web over the last 12 months;
- 4) recommendations of the coherence panel.

Within the period indicated in the planning table below, the service provider will submit the final report in its definitive form, taking full account of the observations made by the Contracting Authority on the draft final report, either by following them precisely or by clearly justifying any deviation. The report shall be accompanied by a request for payment of the balance.

The final report shall be accompanied by an executive summary of maximum 3 pages in English.

The Contracting Authority will process the final report in compliance with the special conditions laid down in the service contract (Annex 1 - section I.5. Payment arrangements).

1.10.4 Meetings

Five meetings will be held with the Contracting Authority (either physically, in its premises in Brussels or virtually):

- Inception meeting: this meeting will be held between the contracting authority, the European Commission (or a Steering committee composed of representatives of the Contracting Authority and/or of other European Commission services) and the contractor within two weeks after submission of the inception report. The purpose of this meeting is to present and report on the progress of task execution, on the basis of the inception report submitted prior to the meeting by the contractor. At the inception meeting, the outputs subject to prior validation by the Contracting Authority will be discussed (agenda of the events, list of speakers, etc. and timing of the tasks during the contract implementation). The purpose of this meeting is also to discuss the structure of the interim report.
- Interim meeting together with the Contracting Authority, the European Commission (or a Steering committee) and the contractor. It will be held within three weeks after the submission of the interim report. The purpose of the interim meeting is the presentation and reporting, by the contractor, on the progress of task execution and

¹⁵ See section **Error! Reference source not found.** "Error! Reference source not found."

delivery of results (state of play, problems encountered and next steps) on the basis of the interim report.

- A progress meeting together with the Contracting Authority and the contractor will be held within two months prior to the organisation of the workshop on integration, scaling-up and cooperation with other EU funding instruments. The purpose of this meeting is to review the progress of the tasks, especially in order to address and clarify any issue concerning the workshop organisation and role of coherence panel.
- A second progress meeting together with the Contracting Authority and the contractor will be held within two months prior to the organisation of the final event. The purpose of this meeting is to review the progress of the tasks, especially in order to address and clarify any issue concerning the organisation of the final event.
- A final progress meeting with the Contracting Authority and the contractor will be held within two weeks of submission of the draft final report. The purpose of this meeting is to discuss the draft final report (state of play, problems encountered, feedback from stakeholders, contingency measures and next steps).

The Project manager of the contract and shall attend these meetings and at least a representative of the lead partner or one of the members of the consortium shall be present at the meetings.

The contractor will submit the minutes of the meetings for the approval of the Contracting Authority within 5 working days;

1.10.5 Deadlines

Timetable (months/weeks/days)	Meetings	Actions/Deliverables
Reference date (T0)		Start date of the contract
T0+4 weeks		Submission of Inception report
T0+6 weeks	Inception meeting	Presentation and discussion of the inception report and comments
T0 + 2 months		List of projects to be included in each cluster submitted for approval to the Contracting Authority
T0 + 3 months		Section on Maritime Forum created and available with relevant information on clusters and projects
T0 + 6 months		Indicators defined and draft tables submitted (task 1.1 and 1.2) to Contracting Authority Submission of Progress report
T0 + 10 months	By this date the progress meeting for organisation of the workshop on integration and cooperation with other EU	

	instruments should have taken place	
T1 = T0 + 12 months		By T1 two cluster workshops and one workshop on cooperation and integration with other EU instruments shall be organised
T1 + 2 weeks		By this date, publication of Workshop summaries organised by T1
T1 = T0 + 12 months		Submission of draft Interim report and deliverables
T1 + 3 weeks	Interim meeting	Comments to the draft interim report to be discussed in meeting with the EASME and the Commission. If required, the contractor shall submit a new version of the report within 2 weeks after the meeting, addressing all comments from the EASME and the Commission.
T1 + 2 months		Submission of Interim report and deliverables Request for interim payment (50% of the contract value)
T1 + 6 months		Submission of Progress report
T1 + 8 months	Progress meeting for final event organisation	
T2 = T1 + 10 months	Minimum two cluster workshops and one final event	By this date all workshops and final event shall be organised
T2		Submission of the draft final report
T2 + 2 weeks	Final progress meeting	Comments to the draft final report to be discussed in meeting with the EASME and the Commission. If required, the contractor shall submit a new version of the report within 2 weeks after the meeting, addressing all comments from the EASME and the Commission. Publication of Workshop summaries

T2 +2 Month

Submission of final report including final version of deliverables and request for payment of the balance

1.11. INTELLECTUAL PROPERTY RIGHTS

The intellectual property rights related to the services will be managed in compliance with the clauses described in the service contract (Annex 1).

Plagiarism in the tender

In the tender all quotations or information originating from other sources and to which third parties may claim rights have to be clearly marked (source publication including date and place, creator, number, full title etc.) in a way allowing easy identification.

2. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES

The contractor must deliver the final report as indicated below.

2.1 CONTENT

2.1.1 Final report

The final report must include:

- an abstract of no more than 200 words and an executive summary of maximum 2 pages, in English;
- specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- the following disclaimer:
 - *“The information and views set out in this publication are those of the author(s) and do not necessarily reflect the official opinion of EASME or of the Commission. Neither EASME, nor the Commission can guarantee the accuracy of the data included in this study. Neither EASME, nor the Commission or any person acting on their behalf may be held responsible for the use which may be made of the information contained therein.”*

2.1.2 Publishable executive summary

The publishable executive summary must be provided in English and must include:

- specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- the following disclaimer:
 - *“The information and views set out in this publication are those of the author(s) and do not necessarily reflect the official opinion of EASME or of the Commission. Neither EASME, nor the Commission can guarantee the accuracy of the data included in this study. Neither EASME, nor the Commission or any person acting on their behalf may be held responsible for the use which may be made of the information contained therein.”*

2.1.3 Requirements for publication on Internet

EASME is committed to making online information as accessible as possible to the largest number of users including those with visual, auditory, cognitive or physical disabilities, and those not having the latest technologies. EASME supports the Web Content Accessibility Guidelines 2.0 of the W3C.

For the publishable versions of the study, abstract and executive summary, the contractor must respect the W3C guidelines for accessible pdf documents as provided at <http://www.w3.org/WAI/>.

For full details on the Commission policy on accessibility for information providers, see:

http://ec.europa.eu/ipg/standards/accessibility/index_en.htm

2.1.4 Structure

The contractor will propose a structure for the draft interim report and final report. The draft report templates will be agreed with the Contracting Authority at the inception and interim meetings.

2.1.5 Graphic requirements

The contractor must deliver all publishable and communication deliverables in full compliance with the corporate visual identity of the European Commission, by applying the graphic rules set out in the European Commission's Visual Identity Manual, including its logo. The graphic rules, the manual and further information are available at:

http://ec.europa.eu/dgs/communication/services/visual_identity/index_en.htm

3. INFORMATION ON TENDERING

3.1 PARTICIPATION

Participation in this procurement procedure is open on equal terms to all natural and legal persons coming within the scope of the Treaties, as well as to international organisations.

It is also open to all natural and legal persons established in a third country which has a special agreement with the Union in the field of public procurement on the conditions laid down in that agreement.¹⁶

States covered by the plurilateral Agreement on Government Procurement concluded within the World Trade Organisation are not included in this call for tenders as the Executive Agencies are not signatories of the Agreement.

In the case of a joint tender (see section 3.4), each member of the group must have access to this procurement procedure.

For tenderers established in the United Kingdom:

🔊 Please be aware that following the entry into force of the EU-UK Withdrawal Agreement* on 1 February 2020 and in particular Articles 127(6), 137 and 138, the references to natural or legal persons residing or established in a Member State of the European Union are to be understood as including natural or legal persons residing or established in the United Kingdom. UK residents and entities are therefore eligible to participate under this call.

* Agreement on the withdrawal of the United Kingdom of Great Britain and Northern Ireland from the European Union and the European Atomic Energy Community.

3.2 CONTRACTUAL CONDITIONS

The tenderer should bear in mind the provisions of the draft contract which specifies the rights and obligations of the contractor, particularly those on payments, performance of the contract, confidentiality, and checks and audits.

¹⁶ Third countries with a special agreement in the field of public procurement that have been given access to procurement procedures of the Union institutions, agencies and bodies regardless of the value of the purchase are: Albania, Bosnia and Herzegovina, North Macedonia, Iceland, Montenegro, Norway, Liechtenstein and Serbia.

3.3 COMPLIANCE WITH APPLICABLE LAW

The tender must comply with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU¹⁷.

Information about the environmental policy of EASME is provided in Annex 9 to these specifications.

3.4 JOINT TENDERS

A joint tender is a situation where a tender is submitted by a group of economic operators (natural or legal persons). Joint tenders may include subcontractors in addition to the members of the group.

In case of joint tender, all members of the group assume joint and several liability towards the Contracting Authority for the performance of the contract as a whole, i.e. both financial and operational liability. Nevertheless, tenderers must designate one of the economic operators as a single point of contact ("the leader") for the Contracting Authority for administrative and financial aspects as well as operational management of the contract.

After the award, the Contracting Authority will sign the contract either with all members of the group, or with the leader on behalf of all members of the group, authorised by the other members via powers of attorney.

3.5 SUB-CONTRACTING

Sub-Contracting is the situation where a contract has been or is to be established between the Contracting Authority and a contractor/tenderer only and where the contractor or tenderer, in order to carry out that contract, enters into legal commitments with other entities for performing parts of the contract. The Contracting Authority has no direct legal commitment with the subcontractor(s). Examples of subcontractors include contractors' suppliers or freelance experts. In practice, any third party involved in the contract implementation which has no legal link with the Contracting Authority but with the contractor will be considered as subcontractor (e.g. any other company which does not participate in the contract execution but provides financial capacity).

Subcontracting is permitted but the contractor will retain full liability towards the Contracting Authority for performance of the contract as a whole. The rules of access to EU public procurement (Section 3.1) do not apply to subcontractors.

Tenderers are required to identify subcontractors whose share of the contract is above 10% or whose capacity is necessary to fulfil the selection criteria.

3.6 COSTS

Tenderers themselves will bear the costs of drawing up their tenders and EASME will not be liable to pay any compensation if a tender is rejected or if it decides not to select any tender.

3.7 CONTENT OF THE TENDER

- The tenders must be presented as follows:
- Part A: Identification of the tenderer (see Section 3.8)
- Part B: Non-exclusion (see Section 4.2)
- Part C: Selection (see Section 4.3)
- Part D: Technical offer (including Annex 6)

¹⁷ Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2004/18/EC (OJ L 94, 28.3.2014, p. 65).

The technical offer must cover all aspects and tasks required in the tender specifications and provide all the information needed to apply the award criteria. Offers deviating from the requirements or not covering all minimum requirements may be rejected on the basis of non-compliance with the tender specifications and will not be evaluated.

For the appraisal, the written submission shall include a clear and detailed description of the organisation, resources and methodology proposed. The tenderers will provide a practical and detailed description of the resources and services proposed to achieve the objectives and results set out in Sections 1.3 and 1.4 above.

This shall include a work plan with:

- a management plan, including roles and responsibilities of the team members and management structure, describing their involvement in each task, way of communication within the team and between the economic operators (in case of a joint tender);
- a set of activities that will explain how the work will be organised to deliver the requested tasks described under section 1.4 and 1.6. Each set of activities will indicate inputs, objectives, expected outcomes, key milestones, resources to be committed, effort in person/month (expressed in percentage for each task) and timetable. In case of joint tender, the contribution of each partner should be identified. Potential risks that could arise in the delivery of the work and feasible options and actions (e.g. contingency plans) to mitigate these risks should be listed. Each set of activities should include the measures taken to ensure quality. This applies particularly to the deliverables and reports.

- Part E: Financial offer (Annex 7)

The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to bear the risks or the benefits deriving from any variation.

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

The quoted price must be a fixed amount, which includes all charges (including travel and subsistence). Travel and subsistence expenses are not refundable separately.

A price must also be quoted to cover the tasks for the possible renewal (see above sections 1.8 and 1.6). That price must be consistent with the prices quoted for the same tasks under the initial contract. In particular, the price quote must be transparent in showing clearly the use of the same units and unit prices in the pricing of the tasks concerned by the renewal, and proportional to the activities involved. The price quoted for the optional renewal of the contract will be taken into consideration when calculating the ranking of tenders (see Section 4.5).

3.8 IDENTIFICATION OF THE TENDERER

The tender must include a cover letter (letter of submission of tender - Annex 2) presenting the name of the tenderer (including all entities in case of joint offer) and identified subcontractors if applicable, and the name of the single point of contact (leader) in relation to this procedure.

In case of joint tender, the cover letter must be signed either by an authorised representative for each member, or by the leader authorised by the other members with powers of attorney (Annex 4). The signed powers of attorney must be included in the tender as well. Subcontractors that are identified in the tender must provide a letter of intent (Annex 5.1) signed by an authorised representative stating their willingness to provide the services presented in the tender and in line with the present tender specifications.

The tenderer (and each member of the group in case of joint tender) must declare whether it is a Small or Medium Size Enterprise in accordance with Commission Recommendation 2003/361/EC18. This information is used for statistical purposes only.

In the course of this tender procedure, the EU Validation Services may contact tenderers via the Participant Register and ask for supporting documents with respect to the legal existence and status. Please note that a request for supporting documents in no way implies that the tenderer has been successful.

Nevertheless, the Contracting Authority may ask, in the course of the procedure, for complementary supporting documents, other than those requested by the EU Validation Services. Such complementary documents may be asked to complete the checks on the compliance of successful entities with the selection criteria and/or to ensure that the entity is not in one of the exclusion situations referred to in this call for tenders.

4. EVALUATION AND AWARD

4.1 EVALUATION STEPS

The evaluation is based solely on the information provided in the submitted tender. It involves the following:

- ✓ 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 set out in these tender specifications
- ✓ Evaluation of tenders on the basis of the award criteria

The Contracting Authority may reject abnormally low tenders, in particular if it established that the tenderer or a subcontractor does not comply with applicable obligations in the fields of environmental, social and labour law.

The Contracting Authority will assess these criteria in no particular order. The successful tenderer must pass all criteria to be awarded the contract.

4.2 VERIFICATION OF NON-EXCLUSION

All tenderers must provide a declaration on honour (Annex 3), signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in that declaration on honour.

In case of joint tender, each member of the group must provide a declaration on honour signed by an authorised representative.

In case of subcontracting, subcontractors whose share of the contract is above 10% or whose capacity is necessary to fulfil the selection criteria must provide a declaration on honour signed by an authorised representative.

¹⁸OJ L 124/36, 20.5.2003

The Contracting Authority reserves the right to verify whether the successful tenderer is in one of the situations of exclusion by requiring the supporting documents listed in the declaration of honour.

The successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour before signature of the contract and within a deadline given by the Contracting Authority. This requirement applies to each member of the group in case of joint tender and to subcontractors whose share of the contract is above 10% or whose capacity is necessary to fulfil the selection criteria.

The obligation to submit supporting evidence does not apply to international organisations.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the Contracting Authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided in a previous procurement procedure, indicate the reference of the procedure and confirm that that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the Contracting Authority can access the document in question on a national database free of charge.

4.3 SELECTION CRITERIA

Tenderers must prove their economic, financial, technical and professional capacity to carry out the work subject to this procurement procedure.

The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links, which it has with them. It must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal (Annex 5.2).

The tender must include the proportion of the contract that the tenderer intends to subcontract.

4.3.1 Declaration and evidence

The tenderers (and each member of the group in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the declaration on honour (see Annex 3), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them. In case of joint tender or subcontracting, the criteria applicable to the tenderer as a whole will be verified by combining the various declarations for a consolidated assessment.

This declaration is part of the declaration used for exclusion criteria (see Section 4.2) so only one declaration covering both aspects should be provided by each concerned entity.

The Contracting Authority will evaluate selection criteria on the basis of the declarations on honour (Annex 3) and the information included in the tables in Annex 2.1 and Annex 2.2, fully completed.

After contract award, the successful tenderer will be required to provide the necessary evidence before signature of the contract and within a deadline given by the Contracting Authority. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit the documentary evidence if it has already been submitted for another procurement procedure and provided the documents were issued not more than one year before the date of their request by the Contracting Authority and are still valid at that date. In such cases, the tenderer must declare on its honour that the documentary evidence has already been provided

in a previous procurement procedure, indicate the reference of the procedure and confirm that that there has been no change in its situation.

A tenderer (or a member of the group in case of joint tender, or a subcontractor) is not required to submit a specific document if the Contracting Authority can access the document in question on a national database free of charge.

4.3.2 Legal and regulatory capacity

Not applicable

4.3.3 Economic and financial capacity criteria

The tenderer must have the necessary economic and financial capacity to perform this contract until its end. In order to prove its capacity, the tenderer must comply with the following criterion:

Average yearly turnover for the last two financial years for which the accounts have been closed, shall amount to at least EUR 337,500,000; this criterion applies to the tenderer as a whole, i.e. the combined capacity of all members of a group in case of a joint tender.

To this effect, the following should be provided with the tender in e-Submission from all tenderers and subcontractors whose capacity is necessary to fulfil the combined capacity:

- **Statement of Turnover in accordance with Annex 2.1** of these tender specifications completed with the information requested.

For tenderers (including all members of the group) except subcontractors:

- In the course of this tender procedure, the EU Validation Services may contact tenderers via the *Participant Register* and ask for supporting documents with respect to their economic and financial capacity. Please note that a request for supporting documents in no way implies that the tenderer has been successful.
- Nevertheless, the Contracting Authority may ask, in the course of the procedure, for complementary supporting documents, other than those requested by the EU Validation Services. Such complementary documents may be asked so as to complete the checks on the compliance of successful entities with the selection criteria.

For subcontractors:

- Subcontractors contributing to the combined financial and economic capacity of tenderers should submit with the tender the following documents in *e-Submission*:
- Copy of the Profit and Loss accounts for the last two years for which the accounts have been closed from each concerned legal entity.

Failing that,

Appropriate statements from banks;

or

Evidence of professional risk indemnity insurance.

If, for some exceptional reason which the Contracting Authority considers justified, a tenderer is unable to provide one or other of the above documents, it may prove its economic and financial capacity by any other document which the Contracting Authority considers appropriate. In any case, the Contracting Authority must at least be notified of the exceptional reason and its justification. The Contracting Authority reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

4.3.4 Technical and professional capacity criteria and evidence

Tenders must provide in their tender the table in Annex 2.2 of these tender specifications, exhaustively completed with all the necessary information.

The evidence mentioned below will be provided only on request except evidences A5 (see table below), B1, B2, B3 (CV only) that should be a part of the submitted offer.

A. Criteria relating to tenderers:

Tenderers (in case of a joint tender the combined capacity of all members of the group and identified subcontractors) must comply with the criteria listed below.

The project references indicated below consist in a list of relevant services provided in the past three years, with the sums, dates and clients, public or private, accompanied by statements issued by the clients.

Criterion	Evidence
Criterion A1: The tenderer must have experience in the organisation of international workshops held in English.	Evidence A1: the tenderer must provide a description of two events organised (one virtual/one in presence) in the last two years with a minimum number of 50 participants, specifying the type, title, the location and number of participants. The participants should include representatives of organisations from at least five EU Member States. At least one of these events should focus on networking and cooperation among stakeholders.
Criterion A2: The tenderer must have experience of ex-post evaluation of projects.	Evidence A2: the tenderer must provide evidence of participation in two ex-post project evaluations (please indicate: the year, the broad topic/domain, and budget range of projects evaluated) in the last 5 years. The tenderer must explain the role played in the evaluation.
Criterion A3: The tenderer must prove experience in website management.	Evidence A3: the tenderer must provide URLs of at least two websites managed.
Criterion A4: The tenderer must prove capacity to draft reports in English.	Evidence A4: the tenderer must provide one full document drafted in English, of at least 10 pages (i.e. report, study, etc.), published or delivered to a client in the last two years. The verification will be carried out on five pages of the document.
Criterion A5: The tenderer must have the capacity to successfully manage projects for clients within given deadlines.	Evidence A5: the tenderer must provide a list of projects together with the name of the client (minimum 2, maximum 3) and letter of good performance or equivalent.

Any tenderer with a professional conflict of interest will be rejected on the basis of not fulfilling the selection criteria for professional capacity.

B. Criteria relating to the team delivering the service:

The team delivering the service should include, as a minimum, the following profiles.

Evidence will consist in CVs of the team responsible to deliver the service. Each CV should indicate the intended function in the delivery of the service.

Criteria	Evidence
✓ B1 - Project Manager: At least five years' experience in project management,	✓ Evidence B1 - CV and a language certificate or past relevant experience

<p>including overseeing projects delivery, quality control of delivered service, client orientation and conflict resolution in projects of EUR 500 000 and with experience in managing a team of at least six people.</p> <p>She/he shall have at least level C2 in English according to the Common European Framework for Reference for Languages¹⁹</p>	
<p>B2 - Expert in communication and event organisation:</p> <p>one expert with a minimum of three years of experience in publications, press and/or public communication, online portal/website management, organisation of events; she/he must be fluent in English (at least level C2 according to the Common European Framework for Reference for Languages)</p>	<p>✓ Evidence B2 – CV and a language certificate or past relevant experience</p>
<p>✓ B3 - Expert in impact assessment/evaluation</p> <p>one expert with at least five years of professional experience in carrying out impact assessment / evaluation of programmes and projects and fluent in in English (at least level C1 according to the Common European Framework for Reference for Languages).</p>	<p>✓ Evidence B3 – CV and a language certificate or past relevant experience</p>

4. 4 AWARD CRITERIA

The contract will be awarded based on the most economically advantageous tender, according to the 'best price-quality ratio' award method. The quality of the tender will be evaluated based on the following criteria. The maximum total quality score is 100 points.

Tenders that receive less than 70% of the maximum possible mark for the whole quality evaluation or less than 50% for each of the quality criteria will be eliminated and their final score will not be calculated. Tenders that do not reach the minimum quality levels will be rejected and will not be ranked.

Excessive long-windedness will be penalised.

Criteria	<i>Maximum Points</i>	<i>Threshold per criterion</i>
<p>✓ <i>Project management and organisation</i></p> <p><i>This criterion will assess the tenderer's approach to work as a team, ensure smooth cooperation and deliver quality</i></p>		

¹⁹ Level envisaged by the Common European Framework of Reference for Languages: Learning, Teaching, Assessment, abbreviated as CEFR. The CEFR describes language ability on a scale of levels from A1 for beginners up to C2 for those who have mastered a language. Information on the CEFR can be found on the Council of Europe website: http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp Self-assessment grids can be found at <http://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr>

<p><i>results. Concretely, this criterion will assess the:</i></p> <ul style="list-style-type: none"> <i>– Soundness of the Management Plan, including share of responsibilities among the team and management structure, roles and involvement in each task, communication within the team and between different economic operators (in case of joint tenders, including subcontractors if applicable);</i> <i>– Allocation of human and technical resources to ensure a successful and timely completion of tasks, including the number of days each team member will spend on each task (all tasks);</i> <i>– Quality control measures: language quality check, quality of deliverables, continuity of the service in case of absence of a member of the team.</i> 	20 points	10
<p>✓ Methodology</p> <p><i>This criterion will assess the quality of the methodology proposed to reach objectives as described under section 1.4 through the WP/tasks described under section 1.6. It will also assess risk assessment and corresponding contingency measures for each of the tasks.</i></p> <p>Sub-criterion 1: evaluation:</p> <p><i>This sub-criterion will assess the methodology to be used for assessing the impacts of the projects as described in task 1.</i></p> <p>Sub-criterion 2: clustering:</p> <p><i>This sub-criterion will assess the methodology proposed for defining thematic clusters, their numbers and proposed approach to fill them with relevant projects.</i></p> <p>Sub-criterion 3: quality of web communication</p> <p><i>This sub-criterion will assess the methodology proposed for producing high quality on-line communication material.</i></p>	50 points	25

<p>✓ Networking and synergies</p> <p><i>This criterion will assess the quality of the methodology to carry out services as requested under WP3. It will also assess, risk assessment and corresponding contingency measures for the specific tasks.</i></p> <p>Sub-criterion 1: workshops/final event organisation <i>This sub-criterion will assess the methodology proposed for defining the workshop topics, organisation of the workshops and final event.</i></p> <p>Sub-criterion 2: Analysis of coherence/synergies with other EU instruments. <i>This sub-criterion will assess the methodology proposed for</i></p> <ul style="list-style-type: none"> - <i>The involvement of the coherence panel at the workshop on integration, scaling-up and cooperation with other EU funding instruments to provide an analysis of coherence and possible /synergies with other EU funding instruments.</i> - <i>the organisation of the specific workshop on integration, scaling-up and cooperation with other EU funding instruments (including selection and invitation of projects representatives among those funded under other EU funding instruments).</i> 	30 points	15
	20 points	
	10 points	

4.5 RANKING OF TENDERS

The contract will be awarded to the most economically advantageous tender, i.e. the tender offering the best price-quality ratio determined in accordance with the formula below. A weight of 70/30 is given to quality and price.

The price used for the ranking of the tenders is the price quoted under "C. *Total price of the contract*" in Annex 7 Price and breakdown of costs"

score for tender X	=	$\frac{\text{cheapest price}}{\text{price of tender X}}$	*	100	*	price weighting (30%)	+	total quality score (out of 100) for all award criteria of tender X	*	quality criteria weighting (70%)
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The tender ranked first after applying the formula will be awarded the contract.

4.6 INFORMATION TO TENDERERS ON THE FINAL EVALUATION

EASME will inform tenderers of decisions reached concerning the award of the contract, including the grounds for any decision not to award a contract or to recommence the procedure.

EASME will inform all rejected tenderers of the reasons for their rejection and all tenderers submitting an admissible tender of the characteristics and relative advantages of the selected tender and the name of the successful tenderer.

However, certain information may be withheld where its release would impede law enforcement or otherwise be contrary to the public interest, or would prejudice the legitimate commercial interests of economic operators, public or private, or might prejudice fair competition between them.

ANNEXES

The following documents are annexed to these specifications and form an integral part of them:

Annex 1: Draft contract and annexes (for information)

Annex 2: Letter of submission of tender (to be filled in and signed by the tenderer)

➤ Annex 2.1. – Statement of turnover

➤ Annex 2.2. – Technical capacity

Annex 3: Declaration on honour (exclusion and selection criteria)

Annex 4: Power of attorney

Annex 5.1: Letter of intent for sub-contractors

Annex 5.2: Letter of intent for third parties

Annex 6: Technical tender form

Annex 7: Financial offer (price and breakdown of costs)

Annex 8: Checklist for Submission

Annex 9: EASME's Environmental Policy