



EUROPEAN COMMISSION

Executive Agency for Small and Medium-sized Enterprises (EASME)

Department A – COSME, H2020 SME and EMFF

Unit A1 – COSME

CALL FOR TENDERS

***Regional Co-Operation Networks for Industrial Modernisation
RE-CONFIRM Initiative"***

EASME/COSME/2016/004

TENDER SPECIFICATIONS

Open Procedure

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EASME/COSME/2016/004

Regional Co-Operation Networks for Industrial Modernisation - RE-CONFIRM Initiative

1. TECHNICAL SPECIFICATIONS

1.1. INTRODUCTION

The Executive Agency for Small and Medium-sized Enterprises (henceforth "EASME" or the "contracting authority")¹, acting under powers delegated by the European Commission, is launching this invitation to tender for Regional Co-Operation Networks for Industrial Modernisation – the RE-CONFIRM Initiative.

The call for tenders is based on Regulation (EU) no 1287/2013 of the European Parliament and of the Council of 11 December 2013 establishing a Programme for the Competitiveness of the Enterprises and small and medium-sized enterprises (henceforth "COSME") (2014-2020) and repealing Decision No 1639/2006/EC. More particularly, it is based on Commission Implementing Decision of 18.01.2016 "on the adoption of the Work Programme for 2016 and the financing for the implementation of the Programme for the Competitiveness of Enterprises and small and medium-sized enterprises" C(2016) 63 final.

1.2. BACKGROUND INFORMATION AND CONTEXT

Brief background and purpose of the tender

A competitive European economy needs a strong industrial base. This requires industry in Europe to modernise including through an increased up-take of advanced technologies and digitalisation in order to deliver innovative products, processes and services. Policy impulse is essential to foster such industrial modernisation, in particular to leverage investments and develop more favourable ecosystems for innovation. There is a need to provide targeted support to regions for creating the right framework for the implementation of their national and regional strategies for smart specialisation.

The RE-CONFIRM Initiative, as a result of the present call, is expected to take stock of the work done by regions to identify their smart specialisation areas and provide a co-operation platform²

¹ EASME was set up by Commission implementing decision 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).

² The RECONFIRM initiative is intended to be part of a Thematic Smart Specialisation Platform at EU level which will be established by the EC services with the aim of accelerating industrial modernisation and investment in Europe. This platform will be instrumental in encouraging industry and regional public administration to cooperate on the implementation of national or regional innovation strategies for smart specialisation and to align public and industry investment roadmaps with the goal of modernising Europe's industrial base with a particular focus on making better use of clusters. The approach will strengthen linkages and synergies between existing funding instruments (European Structural and Investment Funds, European Fund for Strategic Investments, Horizon2020, and COSME) and related support tools, with the objective of identifying concrete investment opportunities and support the generation of an investment project pipeline. The approach follows the context set out in the 2014 Communication on Industrial Policy, the implementation of the European Structural and Investment Funds (CPR Regulation 1303/2013, notably Annex XI - Smart Specialisation ex ante conditionality), and the Council note of November 2015 with the Presidency's

with the aim to establish new and effective co-operation mechanisms among EU regions in specific domains with the active participation of industry and SMEs.

EU policies and initiatives taken on this action

Since 2010³ the European Commission encouraged the design of regional innovation strategies for smart specialisation as a strategic and integrated approach to harnessing the potential for smart growth in all regions. The ex-ante conditionality⁴ required the Member States and regions to put in place national and regional innovation strategies for smart specialisation developed through entrepreneurial discovery process. This process involved businesses, researchers and civil society in identifying a limited number of priorities matching business needs with research strengths. Based on the negotiation phase of the European Structural and Investment Funds 2014-2020 there have been a set of smart specialisation areas (ca.1300) identified by 270 European regions⁵ which reflect the bottom-up priorities of regional innovation ecosystems. In the implementing phase of Research and Innovation Strategies for Smart Specialisation the involvement of industry and business seems fundamental for realising concrete investments.

The Smart Specialisation Platform⁶ and the Regional Innovation Monitor⁷ (RIM and RIM*Plus*) are part of the Commission's effort to embed research and innovation strategies for smart specialisation in the policy-making cycle of regions in Europe with the aim to support establishing better functioning regional innovation systems. In particular, the contribution of the RIM*Plus* was important as a reference point to help develop well informed, evidence-based regional policy responses to the innovation challenges.

Furthermore, following the launch of the Industrial Policy Communication update⁸, the Commission has engaged in a partnership with the Member States and industry in order to step up efforts to boost the uptake of advanced manufacturing technologies and give Europe a competitive lead in the new industrial revolution. The regional dimension needs to be further mobilised to play a decisive role as a spur for the modernisation of industry.

Regions will need to embrace this challenge and work together with industries, academia and civil society to implement Smart Specialisation Strategies and cluster policies for the creation of cross-European value chains.

report on mainstreaming competitiveness, outlining the contribution of clustering and smart specialisation strategies. More information about the Smart Specialisation Platform on Industrial Modernisation and Investment will be made available by the Commission services as soon as available in the course of 2016.

³ Communication 'Regional Policy contributing to smart growth in Europe 2020' COM(2010) 553 final

⁴ See: http://ec.europa.eu/regional_policy/sources/docgener/informat/2014/eac_guidance_esif_part2_en.pdf

⁵ <http://s3platform.jrc.ec.europa.eu/eye-ris3>

⁶ <http://s3platform.jrc.ec.europa.eu/home>

⁷ <https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor>

⁸ A Stronger European Industry for Growth and Economic Recovery - Industrial Policy Communication Update COM(2012) 582 final

Bottom up approaches such as the Vanguard Initiative⁹ can constitute a reference for possible replication and support from the European Commission. Also, events offering participatory platforms for regions and cities to explore relevant collaboration methodologies and thematic areas for Research and Innovation Strategies for Smart Specialisation (RIS3) partnering have been organised¹⁰.

1.3. GENERAL AND SPECIFIC OBJECTIVES

EASME wishes to enter into a service contract.

The European Commission aims at enhancing the competitiveness of industry by, inter alia, providing targeted support to regional authorities in the implementation of their smart specialisation strategies in order to encourage partnership projects for industrial modernisation with focus on transnational, inter-regional and cross-border cooperation and proactive involvement of industry and SMEs.

Hence, the aim of the contract is to foster networks of regions, industry, research and other regional stakeholders involving them in the implementation of smart specialisation strategies and to facilitate co-operation on innovative industrial projects.

The ultimate goal is the promotion, design and initiation of investment partnerships across EU borders aimed at industrial modernisation with players from various EU regions and notably from lagging behind regions.

Specific objectives of the initiative

The RE-CONFIRM initiative will specifically aim at:

- Providing expertise and support to facilitate targeted networking activities at EU level with the aim of establishing concrete co-operation mechanisms and projects based on priorities identified in national and regional smart specialisation strategies.
- In identified industrial areas (selected by the tenderer following the methodology explained here after), helping pooling efforts of regions active in topics of common interest in order to engage them for example in joint pilot plants for developing innovative industry-led applications especially on the basis of existing or new value chains. Additionally, the RECONFIRM Initiative could help identifying investment needs and obstacles that could be addressed through the Investment Plan for Europe¹¹.

⁹ <http://www.s3vanguardinitiative.eu/>

¹⁰ See for example proceedings of the conference held in Brussels on 18/06/2014: **"Smart specialisation strategies: Implementing European Partnerships"**, organised jointly by the Committee of the Regions, the S3 Platform, and the regions of Helsinki-Uusimaa, Utrecht and Valencia or the High-level Debate held in Brussels on 15/10/2015 'How can regional Smart Specialisation Strategies support ecosystems and value chains' organised by EARTO and ERRIN during the Open Days 2015.

¹¹ http://ec.europa.eu/priorities/jobs-growth-and-investment/investment-plan_en

- Where relevant, supporting regions in entrepreneurial discovery process to identify new emerging opportunities which match research strengths with business needs.

1.4. TASKS AND GEOGRAPHICAL SCOPE

1.4.1. Tasks

The initiative will target mainly industry and other business, regional authorities and agencies, R&T centres, Cluster organisations and other business networks, Chambers of Commerce and other local players involved in the implementation of smart specialisation strategies from all EU regions with special focus on lagging regions and regions in transition.

1.4.2. Geographical scope

The services to be delivered will cover all regions of the 28 EU Member States for which there are national and/or regional strategies for smart specialisation.

1.5. INPUT BY THE CONTRACTING AUTHORITY

EASME will provide the contractor with all documents, studies, interim reports that might be useful for the effective implementation of the services contracted.

This will include information about forthcoming initiatives linked to "Modernisation of Industry"¹² such as *Re-enforcing cities and regions as centres for digital transformation* and the *European Observatory for Clusters and Industrial Change* launched by the European Commission (DG GROW¹³) as well as DG GROW's and DG REGIO¹⁴'s joint initiative on *Thematic Smart Specialisation Platforms*¹⁵ and other relevant developments.

1.6. GENERAL GUIDANCE ON METHODOLOGY

To meet the objective mentioned in section 1.3, the tenders must include, as a minimum, the following activities:

- Provide an exhaustive review of existing national and regional innovation strategies for smart specialisation (RIS3), regional studies, analyses and mapping of industrial and research activities and relevant value-chains, including information on missing competences, research and technology uptake per region, and investment needs, gaps and obstacles that could be addressed by the Investment Plan for Europe and targeted regulatory measures and EU funding instruments.
- Stimulate the potential for co-operation via a bottom-up approach entailing the launch of specific calls for expression of interest addressed to institutional, industrial and research

¹² See the COSME Work Programme 2016 (reference being the action COS-WP2016-3-10).

¹³ [Internal Market, Industry, Entrepreneurship and SMEs \(GROW\)](#)

¹⁴ [Regional and urban Policy \(REGIO\)](#)

¹⁵ This is a new initiative which is still under negotiation. The Smart Specialisation Platform on Energy (S3P Energy) may be taken as a reference model: <http://s3platform.jrc.ec.europa.eu/s3p-energy>

players sharing common challenges for involvement in the implementation of smart specialisation strategies.

- Facilitate and enable collaboration across EU borders between firms, clusters and other regional stakeholders to foster access to available innovative technologies and market opportunities. This activity could entail the organisation of industrial plants' visits, peer reviews and or any other initiative that could facilitate cross regional exchanges and collaborations.
- Organise matchmaking and showcasing events in view to set up concrete opportunities of co-operation with the aim of modernising the industrial base of EU regions. Showcasing, where relevant, will include successful Horizon 2020 pilot lines for possible replication and/or funding under ESIF.
- In a limited number of manufacturing areas selected by the tenderer and duly justified (see WP1 below), pro-actively help pooling the efforts of regions and industrial players interested in common topics in order to lead to the development of pilot plans addressing innovative industrial applications.
- Design and implement an effective communication strategy including an information campaign to involve the highest possible number of players, notably industrial partners, in the RE-CONFIRM initiative.
- Ensure follow-up to the RIM Plus project¹⁶ and synergies with existing, ongoing initiatives by the European Commission, other EU institutions and to the extent of possible by EU regions and Member States.

Tenderers must provide an offer addressing in detail the following Work Packages and tasks:

➤ **Work Package 1: mapping overview and selection of areas of action**

Task 1.1

Provide an inventory and complete overview of existing mapping exercises addressing industrial activities and relevant value-chains, including also information on missing competences and technology uptake per EU region. The review will combine updated information from national and regional innovation strategies for smart specialisations, relevant studies, information sources and monitoring tools such as the Smart Specialisation Platform, the Regional Innovation Monitor (RIM Plus), the European Cluster Observatory, the KETs Observatory etc. Especially as regard lagging regions¹⁷, it would be considered as

¹⁶ <https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor>

¹⁷ For the purpose of this call, 'lagging EU regions' means those which are identified as Moderate or Modest innovators in the Regional Innovation Scoreboard 2014 (<http://bookshop.europa.eu/en/regional-innovation-scoreboard-2014-pbNBBC14001/>) and in Moderated and Modest countries of the innovation Union Scoreboard 2015 (http://ec.europa.eu/growth/industry/innovation/facts-figures/scoreboards/files/ius-2015_en.pdf) for countries not covered in the Regional Innovation Scoreboard 2014.

an asset of the proposal if methodology includes the possibility to complement existing evidence with analyses and results of evaluations from projects funded under the European Structural Investment Funds, Horizon2020 and COSME in the area of industrial modernisation, digitalisation of production processes, advanced and additive manufacturing whenever available.

Deliverables: inventory of national and regional innovation strategies for smart specialisation, studies and mapping exercises

Task 1.2

Devise a methodology to select industrial areas where the RE-CONFIRM initiative can facilitate networking and industry commitment with the purpose of establishing co-operation projects and mechanisms based on the regions' smart specialisation areas and technological focus.

The methodology should take into consideration the work carried out in the RIM Plus project on selecting and analysing ten specialisation domains in the area of advanced manufacturing technologies¹⁸. This will enable a targeted selection of regional industrial specialisation areas with focus on industrial modernisation and advanced manufacturing processes. The work of the contractor will also build upon ongoing studies¹⁹ which aim to identify current and future application areas as well as existing industrial value chains. Based on this information, investment needs, gaps and obstacles in existing industrial value chains preventing to develop future application areas should be identified and will be addressed by the contractor in Work Package 2.

Deliverables: methodological paper

Task 1.3

Provide a follow-up to the RIM Plus project²⁰ and notably, ensure updating of the RIM Plus knowledge base (regional profiles) and repository of the main innovation policy support measures in EU regions, at least once per year.

Deliverables: updates of the RIM Plus knowledge base (regional profiles) and repository under the Europa portal²¹. This includes:

¹⁸ see for example the Thematic Reports section of the RIM Plus website and in particular the followings:

<https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor/report/thematic/thematic-paper-policies-and-perspectives-advanced-manufacturing-across-eu-regions>

<https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor/report/thematic/thematic-paper-mapping-advanced-manufacturing-networks-and-exploring-new-business>

¹⁹ such as the ongoing one on "Identifying current and future application areas, existing industrial value chains and missing competence in the EU, in the area of additive manufacturing (3D printing)"

²⁰ <https://ec.europa.eu/growth/tools-databases/regional-innovation-monitor>

- *Update of the repository of policy measures per Region with special reference to data about the implementation of the Smart Specialisation Strategy of the Region*
- *Update of all Regional Baseline profiles including results of the Regional Scoreboard 2016*

The web content should be provided by the contractor and be open to inputs from regional governments and other regional actors (with a quality check by the contractor). The Agency reserves the right to review the interim works and request further modifications. The contractor will send the Agency a first a draft of the revised content for comments and then a final version for approval.

The web pages should be made accessible via the Europa portal and contain links in particular to the other relevant portals, databases, etc. to serve as a hub for information about smart specialisation in the relevant regions.

The final product will have to comply with the graphic guidelines specified in the Commission's guide for information providers available at:

http://ec.europa.eu/ipg/tools/wcm-portal/documentation/tips_factsheets/virtualized-application-jre1.7.0_65/index_en.htm

The site should also respect DG GROW's editorial guidelines and should be created in WCMS (Documentum):

http://www.cc.cec/home/europa-info/tools/authoring/wcm/index_en.htm

➤ **Work Package 2: triggering concrete co-operation**

Task 2.1

Facilitate and enable collaboration across EU borders between firms, clusters and other regional stakeholders to foster access to available innovative technologies and market opportunities with the ultimate objective to be part of the Thematic Smart Specialisation Platform on Modernising Industry.

Launch specific calls for expression of interest to stimulate the potential for co-operation via a bottom-up approach, addressed to institutional and industrial players sharing common challenges in the implementation of smart specialisation strategies.

Particular attention will be paid by the contractor to address the investment needs, and obstacles that prevent the modernisation of the whole value chain. In order to tackle problems and be able to facilitate relevant joint solutions the contractor will be required to proactively involve industry, research community and policy makers in the process.

²¹ The tenderer will be required to provide the web content for the web content management system of the European Commission ("Documentum"). The technical modalities of the content upload under the Europa portal will be defined in agreement with the IT services of the European Commission and EASME.

The Terms of Reference of the above mentioned calls and their content and features must be agreed with EASME and the Commission.

Deliverables: call for expression of interest published every six months under the Europa portal²² and promoted in coherence with the communication strategy (see WP3)

Task 2.2

Organisation of matchmaking events with a view to set up concrete co-operation opportunities to modernise the EU regions' industrial base in line with respective national and regional innovation strategies for smart specialisation.

Deliverables: at least five matchmaking and showcasing events per contractual year. Each of the events should last between 1 to 1.5 days and have a common structure as specified below. Half of the events should take place in Brussels, half in selected regions as identified by the tenderer and in coherence with the RE-CONFIRM promotional strategy (see WP 3). The events will, as a minimum, include the following:

- *Organisation of matchmaking exercise involving a sufficient number of companies, researchers and other players in the relevant value chain. Primary focus will be on encouraging business-to-business and cluster-to-cluster matchmaking. Efforts shall be made to reach out to European Strategic Cluster Partnerships for Smart Specialisation Investments in view of achieving a strong participation from businesses and their supporting cluster organisations.*
- *Presentation of the economic opportunities open to industry and other businesses in the EU regions in specific, well identified industrial sectors/value chains in line with national or regional innovation strategies for smart specialisation;*
- *Presentations from industrial/business representatives about concrete experiences and co-operation strategies;*

Task 2.3

Prepare and initiate co-operation and partnering initiatives among EU regions with close involvement of industry and relevant research community, based on their national and regional smart specialisation strategies, in view to accelerate the development of industrial value chains across the EU borders and lead to the signature of joint commitments.

Deliverables: at least 10 co-operation protocols submitted to the Agency for approval and proposed to potential interested participants. Signature of co-operation agreements might not be achieved by the end of the RECONFIRM project. However, the contractor shall demonstrate to the Agency the progress in the implementation of the co-operation

²² The tenderer will be required to provide the call texts. The technical modalities of the calls' upload under the Europa portal will be defined in agreement with the IT services of the European Commission and EASME.

process by means of preparatory documents, minutes of meetings and any other evidence that could serve the purpose. The participation of Regions identified as Moderate and Modest Innovators in the Regional Innovation Scoreboard 2014 should be sought.

➤ **Work Package 3: targeted promotion and communication activities and synergies**

Task 3.1

Definition and implementation of an effective promotional and communication strategy, including actions to promote industry and SMEs involvement in the national and regional smart specialisation strategies for smart specialisation. This will take into account the Commission's policy objectives related to smart specialisation and industry modernisation (see also 1.2 Background) and the ongoing process of implementation of the smart specialisation strategies in the EU regions and notably in lagging regions.

While the review of the studies and of the mapping exercises will cover all EU regions (NUTSII level), the information campaign and matchmaking events will be targeted to selected regions. The selection should be justified by the tenderer, also, among others, in terms of cost-effectiveness.

Taking as reference the Regional Innovation Scoreboard (RIS) 2014, at least 6 regional Innovation Leaders, 10 regional Innovation Followers, 12 regional Moderate Innovators and 8 regional Modest Innovators will have to be covered. The above regions will have to be representative of at least three countries per group of performance. The capacity of the contractor to cover the target regions of the communication campaign will be assessed as part of the call's award criteria.

The campaign will include the design, the production and the distribution of communication and promotional material. These materials should be suitable also for further distribution through multipliers such as Chambers of commerce, the Enterprise Europe Network²³ (EEN) and other Commission Services.

Although the tenderers are free to propose the most effective promotional activities, communication tools and channels, the tenderers must:

- provide for sound evidence of the reasons behind the selection of given target groups, communication tools and channels, the identification of key messages per target group and the identification of the appropriate working languages to reach the selected target groups, for the material produced;
- propose a clear road map and dissemination plan for the implementation of the strategy;
- identify key performance indicators for monitoring and evaluating communication and promotional activities. These might include metrics such as: number of companies targeted; number of events; coverage on the regional and local media.

²³ <http://een.ec.europa.eu/>

Deliverable: promotional and communication strategy

Task 3.2

Ensure synergies with ongoing initiatives launched by the European Commission (e.g. Smart Specialisation Platform²⁴, the EEN, the Cluster facilitated projects for new industrial value chains²⁵, Horizon 2020 and COSME projects etc.), other EU institutions (e.g. Committee of the Regions) and, to the extent possible, EU regions and Member States.

Provide support to on-going bottom-up initiatives, enlarging their geographical scope, up-scaling ongoing pilot projects and facilitating access to relevant technologies and market opportunities to a greater number of interested EU regions.

Deliverable: operational roadmap to ensure synergies and provide support to ongoing relevant initiatives

1.7. PERFORMANCE AND QUALITY REQUIREMENTS

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

EXPECTED RESULTS (QUALITY OF DELIVERABLES)	PERFORMANCE INDICATORS
<ul style="list-style-type: none"> Inventory of national and regional innovation strategies for smart specialisation, studies and mapping exercises 	<ul style="list-style-type: none"> Degree of comprehensiveness and broadness of the inventory: number of documents, studies and mapping exercises inventoried. Proposed classification method, if any
<ul style="list-style-type: none"> Methodological paper of good quality and operational value 	<ul style="list-style-type: none"> Number of sectors analysed Number of envisaged involved companies, cluster managers and other regional actors (agencies etc.)
<ul style="list-style-type: none"> Updates of the RIM Plus repository under the Europa portal 	<ul style="list-style-type: none"> Number of visits and page views to the RE-CONFIRM webpage Number and relevance of documents uploaded per region Number and position of regional administrators contacted and interviewed, if any Timeliness of the updates

²⁴ <http://s3platform.jrc.ec.europa.eu/home>

²⁵ <https://ec.europa.eu/research/participants/portal4/desktop/en/opportunities/h2020/topics/6084-innosup-01-2016-2017.html>

<ul style="list-style-type: none"> • Successful match making events and showcasing events 	<ul style="list-style-type: none"> • Number of matchmaking events organised • Number of companies participating and sectors covered • Number of regional bodies participating • Number of technological areas per region
<ul style="list-style-type: none"> • Co-operation protocols proposed to potential participants 	<ul style="list-style-type: none"> • Number of regional co-operation networks established and registered participants • Number of protocols proposed including preparatory documents, minutes of meetings and any other relevant evidence • Number of entities involved • Number of protocols implemented and entities involved • Number of technological areas selected
<ul style="list-style-type: none"> • Calls for expression of interest 	<ul style="list-style-type: none"> • Timeliness of publications • Coherence with the communication campaign
<ul style="list-style-type: none"> • Effective and efficient promotional and communication strategy 	<ul style="list-style-type: none"> • Number of print material distributed • Number and type of channels used and targets reached (notably companies) • Use of social media with relevant statistics • Cost efficiency of the campaign

The contractor shall report on each of the indicators listed above (but for the web analytics, which will be provided by the Agency in cooperation with Commission Services).

1.8. STARTING DATE OF THE CONTRACT AND DURATION

It is expected that the contract is signed approximately in the month of October 2016.

The contract shall enter into force on the date on which it is signed by the last contracting party. 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 or before the specific date specified in the contract. Work will follow the timetable detailed below.

The contract may be renewed for 24 additional months, depending on the future needs and on the budget availability. The renewal concerns only the tasks described under Work packages 2 and 3 and task 1.3 of Work package 1 (see above under section 1.6).

1.9. VOLUME OF THE MARKET

The estimated maximum amount for the execution of all the tasks referred to in this call for tenders is **EUR 2.700.000, 00** including all charges and expenses, and excluding any renewals. No contract offer above this amount will be considered.

The estimated maximum amount for the possible renewal is EUR 2.000.000, 00 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 service provider must provide the required reports accompanying the invoices for payments in accordance with the conditions of the draft service contract.

Each report or document will be submitted in electronic format compatible with Word or in other formats previously agreed with the EASME, in English.

List and description of deliverables:

Apart from the Interim and Final Technical Reports described in sections 1.10.1 and 1.10.2 below, the contractor must provide:

- (1) **An initial report (Inception Report)** not later than four weeks after the kick-off meeting. This initial report, which shall describe in detail the proposed approach (the set-up of work, methodology, roles and schedule to allow for timely, cost-efficient and impactful execution of all work packages), should be based on the Minutes of the kick-off meeting and address all comments made therein. The Inception Report shall not exceed 20 pages (annexes excluded).

WP1:

- (2) inventory of national and regional innovation strategies for smart specialisation, studies and mapping exercises;
- (3) methodological paper;
- (4) updates of the RIM Plus repository under the Europa portal.

WP2:

- (5) call for expression of interest published every six months under the Europa portal and promoted in coherence with the communication strategy (see WP3);
- (6) at least five matchmaking and showcasing events per contractual year. Each of the events should last between 1 to 1.5 days and have a common structure as specified below. Half of the events should take place in Brussels half in selected regions as identified by the bidder and in coherence with the RE-CONFIRM promotional strategy (see WP 3);
- (7) at least 10 co-operation protocols proposed to potential participants. Of these, at least 50% should be actually implemented. The participation of Regions identified as Moderate and Modest Innovators in the RIS 2014 should be sought.

WP3:

- (8) promotional and communication strategy;
- (9) operational roadmap to ensure synergies and provide support to ongoing relevant initiatives.

In addition to the deliverables specified above, the contractor has to provide also the minutes and all relevant documentation within a week after each meeting held with the European Commission and/or EASME.

Deliverables for publication (online and/or printed) will be of the highest linguistic quality and will have been edited and proofread by a native English speaker or equivalent.

Together with the above mentioned deliverables, the contractor shall also hand over all source materials and documentation on a USB stick or other equivalent digital medium, in particular the inventory databases, multimedia content, if any.

1.10.1. Intermediate outputs and deliverables

The contractor will closely monitor and report to EASME and the European Commission the rate of participation of industrial players in the initiative, the usage of the communication and promotion material produced and disseminated in the context of this contract.

The Interim Technical Reports shall include at least the following:

- Quantitative monitoring of the industrial participation in matchmaking events organised
- Quantitative monitoring of the actual take up and dissemination of such material.
- Gathering the disseminators' comments and reactions to the material produced by the user service.
- Measuring the impact on the target audiences of the specific communication and promotional products (publication, Internet site, video, event, press articles etc.), with a view to a subsequent independent evaluation of the actions undertaken. These measures may be based, among other things, on polls and/or comments and reactions gathered from the target audiences.

The Interim Technical Reports shall indicate the state of play and the monitoring of the different activities covered by the contract, and shall include at least the following:

- Aims and objectives of the activities performed;
- Description of the work performed; results, outcome and impact;
- List of "interim" deliverables (those developed within the period covered by the interim report);
- Changes/delays with respect to the original plans; justification for changes and measures taken to compensate for possible delay in schedule;
- Tasks to be performed in the remaining contract period with a corresponding timeline;
- Issues encountered and how they have been solved;
- Awaited risks and mitigating measures;
- An assessment of the activities and recommendations to improve management procedures;

- Any comments, suggestions or recommendations judged useful or necessary by the Contractor;
- A summary of all the actions and measures undertaken in the framework of the RE-CONFIRM initiative as well as of the awareness raising activities to ensure participation of industry and other business according to the overall strategy.

The Interim Technical Reports shall raise any problems encountered with sufficient information to permit re-orientation of the work if appropriate. They shall give clear indications and detailed planning of the work to be carried out during the rest of the contract period.

The Interim Technical Reports shall not exceed 30 pages, annexes excluded.

Three Interim Technical Reports are due during the implementation, as follow:

- 1) A first Interim Technical Report containing the preliminary results of the three Work Packages during at least the first 5 months of implementation;
- 2) A second Interim Technical Report containing the preliminary results of the three Work Packages during at least the first 11 months of implementation;
- 3) A third Interim Technical Report containing the preliminary results of the three Work Packages during at least the first 17 months of implementation.

EASME will comment on the documents submitted within the deadlines given in the draft service contract. EASME will have **30 calendar days** to formulate its comments/considerations/recommendations.

1.10.2. Final outputs and deliverables

The draft Final Technical Report shall include all the elements specified in section 1.9 "Planning and deliverables" and elaborate at least on the following items:

- Aims and objectives of the activities performed;
- Description of the work performed; results, outcome and impact;
- List of deliverables;
- Changes/delays with respect to the original plans and their justification;
- Issues encountered and how they have been solved;
- Evaluation of the performed work (on the basis of the performance indicators);
- Any comments, suggestions or recommendations judged useful or necessary by the Contractor for future initiatives and follow-up actions;
- A summary of all the actions and measures undertaken in the framework of the RE-CONFIRM initiative as well as of the awareness raising activities to ensure participation of industry and other business according to the overall strategy.

The Final Technical Report shall not exceed 30 pages, annexes excluded.

EASME will comment on the documents submitted within the deadlines given in the draft service contract. EASME will have **30 calendar days** to formulate its comments/considerations/recommendations.

Timetable	Meetings	Actions/Deliverables
<i>Reference date</i>		Start date of the contract
Reference date + 2 weeks	1° coordination meeting with EASME / European Commission: Kick-off meeting	The project is launched at the meeting between the contractor, EASME and the Commission. The kick-off meeting will ensure that the contractor has a clear understanding of the terms of the contract and the objectives of the project.
Reference date + 4 weeks		Submission of the Inception Report (which must address all comments made at the kick-off meeting).
<i>Month A (ref. date + 6 months)</i>		Submission of draft 1 st Interim Technical Report.
<i>Month A + 2 weeks</i>	2° coordination meeting with EASME / European Commission	Discussion on the draft 1 st Interim Technical Report. The aim is to check that the planned work has been performed on schedule and in accordance with the Agency's / European Commission's quality standards and expectations and to agree – if needed – on adjustments to be made to the remaining work. The contractor will draft the minutes which will have to be circulated and approved by EASME.
<i>Month A + 4 weeks</i>		Submission of 1 st Interim Technical Report (which must address all comments made at the coordination meeting). Submission of invoice for a first interim payment.

<i>Month B (= ref. date + 12 months)</i>		Submission of the draft 2 nd Interim Technical Report.
<i>Month B +2 weeks</i>	3° coordination meeting with EASME / European Commission	<p>Discussion on the draft 2nd Interim Technical Report.</p> <p>The aim is to check that the planned work has been performed on schedule and in accordance with the Agency's / European Commission's quality standards and expectations and to agree – if needed – on adjustments to be made to the remaining work.</p> <p>The contractor will draft the minutes which will have to be circulated and approved by EASME.</p>
<i>Month B + 4 weeks</i>		<p>Submission of 2nd Interim Technical Report (which must address all comments made at the coordination meeting).</p> <p>Submission of invoice for a second interim payment.</p>
<i>Month C (ref. date + 18 months)</i>		Submission of the draft 3 rd Interim Technical Report.
<i>Month C + 2 weeks</i>	4° coordination meeting with EASME / European Commission /	<p>Discussion on the draft 3rd Interim Technical Report.</p> <p>The aim is to check that the planned work has been performed on schedule and in accordance with the Agency's / European Commission's quality standards and expectations and to agree – if needed – on adjustments to be made to the remaining work.</p> <p>The contractor will draft the minutes which will have to be circulated and approved by EASME.</p>
<i>Month C + 4 weeks</i>		Submission of 3 rd Interim Technical Report (which must address all comments made at the coordination

		meeting). Submission of invoice for a third interim payment.
<i>Month D (ref. date + 22 months)</i>		Submission of the draft Final Report.
<i>Month D + 30 days</i>	Final coordination meeting with EASME / European Commission	EASME comments on the draft Final Report and general evaluation of the contractor's service. The contractor will draft the minutes which will have to be circulated and approved by EASME.
<i>Reference date + 24 months</i>		Finalisation of deliverables. Submission of the Final Report. Submission of invoice for the balance payment.

2. CONTENT AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES

The contractor must deliver the report and other deliverables 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 6 pages
- ✓ 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 report are those of the author(s) and do not necessarily reflect the official opinion of EASME or the Commission. EASME and the Commission do not guarantee the accuracy of the data included in this study. Neither EASME or the Commission nor any person acting on EASME's or the Commission's behalf may be held responsible for the use which may be made of the information contained therein."

2.1.2. Requirements for publication on Internet

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

For full details on the Commission policy on accessibility for information providers, see: http://ec.europa.eu/ipg/standards/accessibility/index_en.htm

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/>.

2.1.3. Graphic requirements

The contractor must deliver all publishable 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

A simple Word template will be provided to the contractor after contract signature. The contractor must fill in the cover page in accordance with the instructions provided in the template. The use of templates is exclusive to European Commission's contractors. No template will be provided to tenderers while preparing their tenders.

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.

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

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.

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/EU²⁶.

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

Subcontracting is the situation where a contract has been or is to be established between the contracting authority and a contractor 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). 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.

Tenderers are required to identify all subcontractors whose share of the contract is above 5%.

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)

²⁶ 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).

➤ Part C: Selection (see Section 4.3)

➤ Part D: Technical offer (including Annex 6)

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

The organisation of the resources and a summary table indicating the members of the team and describing their roles and involvement in each project phase must be provided.

➤ 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 not be taken into consideration when calculating the ranking of tenders (see Section 4.5, footnote 32).

3.8. IDENTIFICATION OF THE TENDERER: LEGAL CAPACITY AND STATUS

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 6). 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 7) signed by an authorised representative stating their willingness to provide the services presented in the tender and in line with the present tender specifications.

All tenderers (including all members of the group in case of joint tender) must provide a signed Legal Entity Form with its supporting evidence. The form is available on:

http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm

Tenderers that are already registered in the Contracting Authority's accounting system (i.e. they have already been direct contractors) must provide the form but are not obliged to provide the supporting evidence.

The tenderer (or the leader in case of joint tender) must provide a Financial Identification Form with its supporting documents. Only one form per tender should be submitted. No form is needed for subcontractors and other members of the group in case of joint tender. The form is available on: http://ec.europa.eu/budget/contracts_grants/info_contracts/index_en.cfm.

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/EC. This information is used for statistical purposes only.

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 tenders will be assessed in the order indicated above. Only tenders meeting the requirements of one step will pass on to the next step.

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, all subcontractors whose share of the contract is above 5% must provide a declaration on honour signed by an authorised representative.

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 all subcontractors whose share of the contract is above 5%.

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 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 legal, regulatory, 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.

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, the documents provided and the information included in the tables in Annex 2.1 and Annex 2.2, fully completed**. Nevertheless, it **reserves the right to require (additional) evidence** of the legal and regulatory, financial and economic and technical and professional capacity of the tenderers **at any time during the procurement procedure and contract performance**. In such case the tenderer must provide the requested evidence without delay. The Contracting Authority may reject the tender if the requested evidence is not provided in due time.

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 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

Tenderers must prove that they are allowed to pursue the professional activity necessary to carry out the work subject to this call for tenders. The tenderer (including each member of the group in case of joint tender) must provide the following information in its tender if it has not been provided with the Legal Entity Form:

- For legal persons, a legible copy or of the notice of appointment of the persons authorised to represent the tenderer in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation applicable to the legal person requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.
- For natural persons, if required under applicable law, a proof of registration on a professional or trade register or any other official document showing the registration number.

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:

Its average annual turnover for the last two years for which the accounts have been closed shall amount to at least one and a half times the volume of the market as specified in point II.1.5 of the contract notice; 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 **tenderers are requested to provide in their tender Annex 2.1** of these tender specifications completed with this information.

The following evidence (only in electronic version or link to website) will also be provided with the tender:

- ✓ 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. EASME 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.

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.

Criteria	Evidence
✓ Criterion A1: A minimum of three years of practical experience in the preparation of reports in the area of innovation and industrial policy as well as regional policy, cohesion funds and smart specialisation.	✓ Evidence A1: the tenderer must provide references for projects delivered in these fields in the last three years.
✓ Criterion A2: A minimum of three years of practical experience in organising and conducting events involving regional policy makers and other regional actors such as clusters managers, regional agencies etc., as well as in the dissemination of results resulting from policy analysis with direct involvement of industry and SMEs.	✓ Evidence A2: the tenderer must provide references for projects delivered in these fields in the last three years.
✓ Criterion A3: A minimum of three years of practical experience in managing and providing content for webpages.	✓ Evidence A3: the tenderer must provide references for projects delivered in that field in the last three years.
✓ Criterion A4: Have implemented at least 1 project/service involving the collection of	✓ Evidence A4: the tenderer must provide references and a short description (max. 1 page)

information and analysis at a large scale, covering at least 12 EU Member States, taking into account the different language regimes existing in all these countries	for the project in question, specifying EU Member States and the language regimes covered, and the means by which they were covered.
✓ Criterion A5: Have implemented at least 1 project/service involving the management of visits, promotional and matchmaking events, addressed to at least 6 EU Member States.	✓ Evidence A5: the tenderer must provide references and a short description (max. 1 page) for the project in question, specifying EU Member States and the language regimes covered, and the means by which they were covered.

B. Criteria relating to the team delivering the service:

The team (as a whole) 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 5 years' experience in project management, including overseeing project delivery and quality control experience in very complex projects (with a budget of more than € 1.000.000) and coverage (direct involvement in studies and/or activities in at least one third of the countries covered in this call for tenders), with experience in management of a team of at least 6 people.	✓ Evidence B1 – CV
✓ B2 - Language quality controller: At least 1 member of the team responsible for delivering each work package should demonstrate a native level English language proficiency or equivalent ²⁷ .	✓ Evidence B2 - A language certificate or past relevant experience
✓ B3 – Expert(s) in web editing: <ul style="list-style-type: none"> - A level of education which corresponds to completed university studies, preferably in journalism/communication attested by a diploma when the normal period of university education is three years or more; - At least 3 years of relevant professional experience, notably experience in writing and editing for the web; - Previous professional experience in working with 	✓ Evidence B3 – CVs and a language certificate or past relevant experience

²⁷ 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>

content management systems; - Native level English language proficiency or equivalent ²⁸ .	
✓ B4 – Expert(s) in communication: <ul style="list-style-type: none"> - A level of education which corresponds to completed university studies, preferably in journalism/communication attested by a diploma when the normal period of university education is three years or more; - At least 5 years of relevant professional experience in the field of communication and in particular social media; - Native level English language proficiency or equivalent²⁹. 	✓ Evidence B4 – CVs and a language certificate or past relevant experience
✓ B5 – Expert(s) in event management: <ul style="list-style-type: none"> - At least 5 years of professional experience in event management (including organisation of online live events). 	✓ Evidence B5 – CV

The Detailed curriculum vitae (in Euro pass format³⁰) covering relevant educational and professional qualifications should be up to two A4 pages for each of the team members and must specify:

- The different diplomas obtained (copies of which may be requested by EASME where appropriate);
- Languages spoken;
- Expertise and experience relevant to the subject matter of the present invitation to tender;

CV outlines must be provided for all staff assigned to the project, with the exception of administrative, secretarial and other support staff. The contractor(s) shall ensure that the staff members listed in their proposal are effectively available and assigned to the project when it begins.

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 60% 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.

²⁸ Levels envisaged by the CEFR, see previous footnote

²⁹ Levels envisaged by the CEFR, see previous footnote

³⁰ <https://europass.cedefop.europa.eu/en/home>

No.	Criteria	Points
1	<p><i>Relevance and geographical coverage</i></p> <p>Extent to which the proposed activities are in line with the objectives of the call, show understanding of the challenges related to the value-chain approach, including the analysis of gaps and obstacles to investment.</p> <p>This criterion includes effectiveness of the proposed methodology to select targeted industrial areas in line with national and regional innovation strategies for smart specialisation, the extension and balance of the geographical coverage and the extent to which it includes EU lagging regions as defined in footnote 13 above with relevant analysis, the coherence, appropriateness and feasibility of the activities proposed. This criterion covers also the level of detail of the work programme, the effectiveness of the bottom-up approach and likelihood of triggering concrete partnerships with the proposed methodology so that they could be a part of the Smart Specialisation Platform for Industry Modernisation and Investment.</p>	40
2	<p><i>Quality and resources</i></p> <p>Overall quality and clarity of the bid including the extent to which the budget is complete, detailed and in line with the objectives.</p> <p>This criterion covers also the human resources mobilised to carry out the work in selected EU regions, structure of the team, the allocation of tasks and the feasibility to complete the work within the time span envisaged in the call. Adequacy of human and technical resources allocated for each project phase based on the detailed information provided.</p>	30
3	<p><i>Impact and visibility</i></p> <p>Extent to which the initiative will be promoted and will be likely to increase interest about smart specialisation strategies in particular among industrial players and business.</p> <p>This criterion includes the envisaged promotional strategy, the ways of dissemination by which the communication actions will be able to target regional players the proposed geographical coverage of the communication campaign and its feasibility.</p> <p>It includes also the extent to which the proposed actions contain multiplier effects and will be likely to build synergies with existing initiatives at national or local level and generate a pipeline of realistic investment projects across EU.</p>	30
TOTAL POINTS		100

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 price³¹.

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.

5. ANNEXES

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

Annex 1: Draft contract (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: Letter of intent for sub-contractors

Annex 6: Technical tender form

Annex 7: Price and breakdown of costs (financial offer)

³¹ The price used for the ranking of the tenders is the price quoted under "A- Total price of the original contract" in Annex 7 Price and breakdown of costs.

Annex 8: Checklist of documents