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Executive Agency for Small and Medium-sized Enterprises (EASME)
Department A – COSME, H2020 SME and EMFF
Unit A1 - COSME

CALL FOR TENDERS

INNOVATION AND BUSINESS MANAGEMENT TRAINING: DEVELOPING CAPACITIES IN THE ENTERPRISE EUROPE NETWORK AND SUPPORTING INNOVATION ASSOCIATES IN SMEs

EASME/H2020/INNO/2016/020

TENDER SPECIFICATIONS

Open Procedure

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INNOVATION AND BUSINESS MANAGEMENT TRAINING: DEVELOPING CAPACITIES IN THE ENTERPRISE EUROPE NETWORK AND SUPPORTING INNOVATION ASSOCIATES IN SMEs

1. 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 the provision of training in the area of innovation management and industrial innovation/business management. The aim is to improve the knowledge and skills related to innovation management in two distinct target groups:

- business support organisations that are partners in the Enterprise Europe Network
- a group of experienced researchers that temporarily work in Small and Medium-sized enterprises (SME) in the context of the European SME Innovation Associate - pilot².

Ultimately, the provided training shall contribute to a better availability of innovation management skills and consulting services for SME, thereby empowering them to manage innovation processes more efficiently and to higher economic impact.

As training and capacity-building activities shall be provided to two distinct target groups and in the context of two larger initiatives of the European Union (EU)³, this call is divided into two lots:

- **Lot 1:** Further developing the consulting capacity in innovation management in the Enterprise Europe Network
- **Lot 2:** Core training on industrial innovation management in the context of the European SME Innovation Associate - pilot

1.2. BACKGROUND INFORMATION AND CONTEXT

Small and Medium-sized companies are key to the economic recovery and development of the European Union. SMEs are considered as agile and flexible but often only have limited resources for innovation activities. While Member States and the EU provide subsidies to encourage further innovation activities in European regions, SMEs have to manage their innovation

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 [Horizon 2020 – Innovation in SMEs – INNOSUP-02-2016: European SME Innovation Associate - pilot](#)

³ Horizon 2020 Work Programme, chapter 7 – Other Actions: Services in 2017/18 of the Enterprise Europe Network "enhancing the innovation management capacity of SMEs" and providing "key account management" to beneficiaries of the SME Instrument; and [Horizon 2020 – Innovation in SMEs – INNOSUP-02-2016: European SME Innovation Associate - pilot](#); respectively

processes efficiently in order to maintain or strengthen their role as innovation drivers and creators of jobs and growth.

In business literature "innovation management", understood as the efficient and effective management of processes from the creation of ideas to the generation of profit from innovative products in the market, is a relatively new subject. European standardisation bodies only agreed on a common definition of the innovation management system of an enterprise in 2013⁴.

Unlike in the areas of quality management, which is *inter alia* driven by purchasers in long supply chains, and environmental management, where public interest is a driver, the market for consulting services related to innovation management is poorly developed. The supply of 'innovation managers' out of tertiary education is small and they are quickly absorbed in large enterprises. Where they exist, daily rates charged on business-to-business are beyond the means of small enterprises.

Against this background the EU has decided to take a proactive role in making skills and consulting services in innovation management accessible to SME. More than ever, the EU with its investments into SME innovation aims at accelerating company development and growth, from the very early stage to market introduction, with direct and indirect complementary support measures foreseen at every step of the way.

Horizon 2020, the EU's framework programme for research and development, offers a series of integrated measures aimed at supporting SMEs throughout the innovation cycle, in view of promoting their growth and development.

In this context, chapter 7 on "Innovation in SMEs" of the Horizon 2020 Work Programme 2016-2017⁵ envisages specific support measures that improve the capacities of SMEs to innovate efficiently and to generate growth and market impact through innovation. Two actions in this Work Programme directly support enhancing the innovation management skills of SMEs. This call for tender, divided into two lots, address the provision of training related to innovation management in the context of these two actions.

Lot 1: Further developing consulting capacity in innovation management in the Enterprise Europe Network

The Enterprise Europe Network⁶, established under the European Union's Programme for Competitiveness of Enterprises and SMEs (COSME), is an important instrument of the European Commission to support the competitiveness and growth of small and medium-sized enterprises. It provides value-added business and innovation support services that help SMEs do business in the Single Market and that are designed to improve the competitiveness and innovation capacities of European SMEs.

At the same time, Horizon2020 recognises the importance of innovation management for the creation of economic impact from innovation activities of SMEs. 'Enhancing the innovation management capacity of SMEs' is therefore one of the objectives of the 2016-2017 Work Programme (chapter 7: "Innovation in SMEs", see above).

⁴ The CEN/CENLEC TS-16555-1 defines the innovation management system of an enterprise. All references to 'innovation management' in this tender document should be understood as a reference to definitions and concepts applied in this TS-16555-1.

⁵ European Commission Decision C(2016)1349 of 9 March 2016, http://ec.europa.eu/research/participants/data/ref/h2020/wp/2016_2017/main/h2020-wp1617-sme_en.pdf

⁶ See <http://een.ec.europa.eu> for more details

This, in turn, depends on the availability of a high quality assessment tool and a proficient consulting offer at affordable prices for SMEs. But markets for specialised innovation management consultancy are weakly developed in many regions and/or the limited supply is often not affordable for the majority of SMEs.

To address this, the Enterprise Europe Network provides innovation management support services to highly innovative SMEs in Europe under a separate action.⁷ These services have to be aligned with the technical standard on innovation management systems CEN/TS 16555-1.

Lot 2: Core training on industrial innovation management in the context of the European SME Innovation Associate - pilot

In order to develop an initial innovation idea into an innovation project with realistic commercial potential, SMEs often require access to knowledge that is not available in their traditional environment. Although the necessary skills are often available in academia, mobility of human resources from the academic sector to SMEs has been limited so far.

Horizon 2020 aims to encourage cross-border worker mobility between academia and SMEs by establishing a pilot programme that provides financial support to SMEs who employ a highly qualified researcher with the aim of developing an innovation idea into a feasible project. At the same time, it helps increase the visibility of opportunities in SMEs in the academic world. This "European SME Innovation Associate" programme⁸, established by the Horizon 2020 Call for Proposals INNOSUP-2-2016, will fund the employment of up to 90 researchers ("Innovation Associates") by SMEs. The aim is to provide SMEs with access to knowledge that is not available or affordable in their own national context.

1.3. GENERAL AND SPECIFIC OBJECTIVES

EASME wishes to enter into a service contract for each of the lots.

Lot 1

With reference to "Other Action 3 – Further developing the consulting capacity in innovation management in the Enterprise Europe Network" ⁹, Lot 1 of this call for tenders aims at improving the quality of these innovation management support services for SMEs delivered by the Enterprise Europe Network. To this end, a training environment is required to build and expand the competences of innovation management advisers working in the Enterprise Europe Network, providing:

- General introductory training in 'innovation management' for staff who are new to these consulting tasks;
- Specialised training / capacity building in the different parts and processes of innovation management systems in SMEs.

As a result of this contract, it is expected that a maximum number of Enterprise Europe Network innovation experts who deliver services "enhancing the innovation management capacities of SMEs" are trained and expand their knowledge in innovation management consultancy. These

⁷ Horizon 2020 Work Programme, chapter 7 – Other Actions: Services in 2017/18 of the Enterprise Europe Network "enhancing the innovation management capacity of SMEs" and providing "key account management" to beneficiaries of the SME Instrument

⁸ See <https://ec.europa.eu/easme/en/h2020-sme-innovation-associate>

⁹ Horizon 2020 Work Programme, chapter 7 – Innovation in SMEs

newly acquired skills will be deployed immediately in the Network's delivery of innovation management support. They will also help to widen the access of SMEs to qualified innovation management consulting throughout the EU.

Lot 2

European SMEs and start-ups are facing barriers to the recruitment of highly qualified specialists (PhD or equivalent) due to the fact that these profiles are not available on the national job market (either because the required skills are not available or because they are not affordable). However the spin-in of this knowledge would be crucial to open up opportunities for innovation and significant growth of the enterprises.

On 11 February 2016 the European Commission launched a new pilot Call for Proposals supporting the matchmaking between European SMEs with brilliant innovation business ideas and highly qualified researchers. Up to 90 SMEs will be offered financial support to employ and train a PhD holder for a period of 12 months, starting in September 2017, to develop the business idea into an innovation project.¹⁰

The first year of a project is the most delicate and risky for an enterprise as it implies a financial as well as strategic investment. In fact, quite often a small company is only able to invest time and resources in one project every 2-3 years. Consequently, a wrong investment can hamper the growth and even put at risks the very existence of the enterprise. This is not only the case because of financial risks involved in such an investment, but also because in most SMEs, investing in one project usually stops or at least delays investment in something else. At the same time, innovation remains key to the development and competitiveness of enterprises.

In this context, the SME Innovation Associate programme provides early-stage support to enterprises while at the same time providing an 'idea check' mechanism. The former implies risk mitigation for the company and overcomes financial barriers to the recruitment of highly skilled specialists, while the latter allows an SME to test an innovation idea with international experts.

On the other hand, the programme is also interesting for researchers who are increasingly facing the consequences of financial restrictions in the academic sector, or who are envisaging a new phase in their career path.

Since SMEs account for both the vast majority of businesses in Europe, and the largest share of job creation in the EU, they could be an attractive destination for researchers looking for career options in industry. However, mobility between the research sector and SMEs remains low. The European SME Innovation Associate pilot (INNOSUP 2) aims to overcome these barriers.

At the same time, it is acknowledged that an experienced researcher requires additional training to meet skills needs on innovation management in SMEs. To this end, and to support the experienced researchers recruited by SMEs in the frame of the SME Innovation Associate programme, the Horizon 2020 Work Programme 2016-2017 (chapter 7 – Innovation in SMEs – see above) provides for the establishment of a dedicated training programme on industrial innovation and business management¹¹.

It is expected that around 12 working days of training will be provided to each Innovation Associate, including on-line training. Participation in the training programme is compulsory for all Innovation Associates who are part of the INNOSUP-2-2016 Pilot Action. It is estimated that up to 90 Innovation Associates and up to 90 supervisors will be eligible to receive training.

¹⁰ [Horizon 2020 – Innovation in SMEs – INNOSUP-02-2016: European SME Innovation Associate - pilot](#)

¹¹ "Other Action 6 – Core training to the European Innovation Associate – pilot (INNOSUP-02)"

As a result of the training, the Innovation Associates who are most likely to be PhD holders in technical subjects, will acquire a specific additional qualification that allows them to act as 'innovation managers' in industry and, in particular, in the SMEs supported by the grants awarded under INNOSUP-02-2016 (Innovation Associate – pilot).

The training programme should also support the follow-up and upscaling of the ideas into research projects/products, by providing specific sessions on European-level funding schemes for a period of 1-2 working days.

Apart from supporting the exploration of the up to 90 innovation business ideas selected under the SME Innovation Associate Programme, the training could also be the opportunity to learn and develop skills in innovation management for potential future career options in the industry sector.

1.4. TASKS

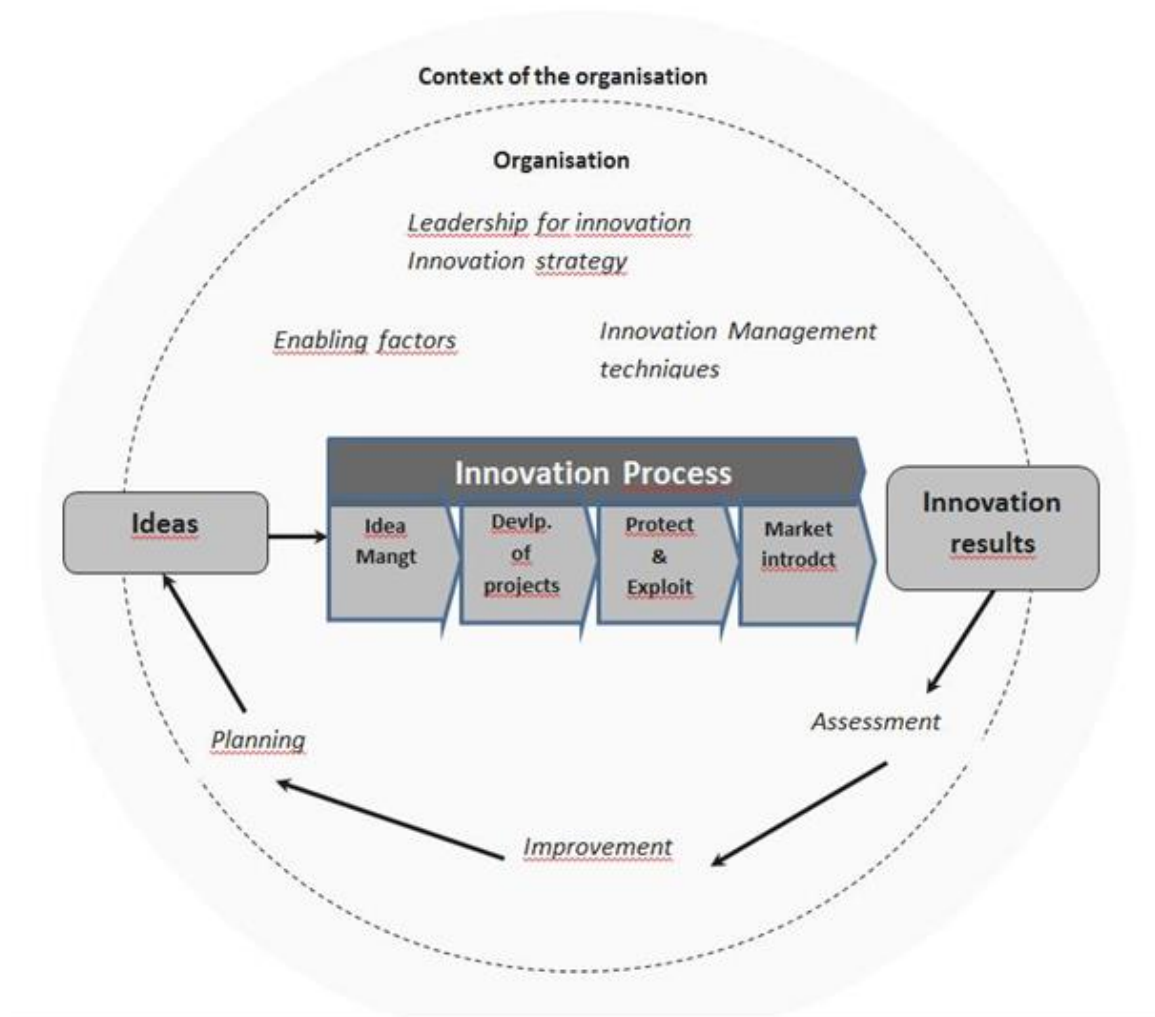
Lot 1

The contractor will provide eligible staff members of the Enterprise Europe Network with access to a training and capacity building environment that enables them to develop their competencies needed to deliver services "enhancing the innovation management capacities of SMEs". No training fee or other cost shall be charged to the participants for these trainings. Furthermore, a training and skills development environment shall be made available and maintained.

The training shall address the following topics:

- Introductory training for people who are familiar with innovation support, but unfamiliar with innovation management (it is expected that about 50 Enterprise Europe Network staff members per year would require such training)
- Training in the creation of an action plan based on an assessment of the innovation management performance of an enterprise. Network partners use a variety of tools to assess innovation management performance. The most frequently-used tool is the IMP³rove Assessment Tool. Training in the creation of action plans should not be restricted to a plan based on the IMP³rove assessment but it must be included the trainings¹²;
- Training on all specific elements of the innovation management cycle as illustrated in the chart below summarising CEN/TS 16555-1;
- Trainings on specific tools and methodologies to enhance performance in these elements.

¹² A sample IMP³rove assessment report is available online at <https://www.improve-innovation.eu/our-services/assessments/improve-assessment/>



Other aspects that might be covered in the training offer should include, but are not limited to:

- Innovation in value chains
- Digitisation
- Crowdsourcing, working with innovation leaders

Trainings may take place in the form of regular training courses at a central location in the EU provided by the contractor. Furthermore, the option of holding trainings at premises made available by Enterprise Europe Network partners must be foreseen, provided that a sufficient number of participants register.

In addition to these training events, the development and provision of webinars and/or e-learning modules is also required. The contractor shall be in charge of the design, preparation and delivery as well as of the collection and analysis of feedback from participants.

The tenderers shall explain clearly in their offers what the proposed number and duration (in working days) of training events is, and what their respective maximum capacity will be. It is expected that four full working days of training are available for each of the up to 450 eligible staff members per year. Therefore, the number of training days offered shall not be less than 1800.

The training environment shall be made available in full to eligible staff members of the Enterprise Europe Network without interruption throughout the entire duration of the contract.

The Contractor will:

- Provide a venue for the training seminars located within the European Union and not further than two hour's travel from an international airport with convenient connections across Europe. Different training seminars / sessions may be organised in different locations. At the request of Enterprise Europe Network partners, training sessions can also be carried out at premises provided by the latter. For trainings organised outside the central location(s) provided by the contractor, a minimum threshold for the number of participants may be applied;
- Provide on-site catering for those training seminars organised entirely by the contractor (this is not applicable if an Enterprise Europe Network partner requests a training to be held at their location – in such cases, the latter is in charge of the logistics for the meeting). Cover travel, accommodation and subsistence costs for their own staff or invited speakers acting as trainers or providing support to the trainings;
- Develop new (and/or revise existing) training modules and training materials, including on-line and self-learning modules;
- Make available all training material used, to the participants;
- Offer interested Enterprise Europe Network staff members the possibility to receive a certificate proving their successful participation in the training programme;
- Inform EASME on a regular basis about the extent and nature of use of the training programme by Enterprise Europe Network staff members, attendance figures, feedback and other statistics / information that can help understand the patterns of use of the training programme by the Enterprise Europe Network;
- Propose, discuss and, if necessary, implement actions agreed with EASME to contribute to improving the service delivery and the uptake by the Enterprise Europe Network;
- Upon EASME's request, participate in a small number (max. two per year) of experience sharing and training events organised by EASME for the Enterprise Europe Network. Such events usually take place in Brussels.
- Provide individual *ad-hoc* support on issues covered in the trainings to support Network staff in the assessment of innovation management capacities in SMEs (for example by telephone or e-mail).
- Participate in contractual and operational meetings organised by EASME in Brussels according to the calendar in section 1.9.2. below.

Lot 2

The objective of the training is to provide the Innovation Associate with skills in industrial innovation management in general and, in particular, in the context of the exploitation of his/her specific knowledge as a researcher in the context of the employing enterprise. The trainings shall therefore be a mix of general training on innovation management, individualised support in the context of specific enterprises and opportunity to exchange with peers on the personal experience in context of the trainings or additional events.

The general scope of the training is provided by the CEN/CENELEC TS-16555 on innovation management systems.

The contractor has to provide tools to allow the Innovation Associate undertake an assessment of the existing innovation management system and its impact on the company's development, in line with this standard.

The contractor will provide at least 3 and not more than 4 training seminars: one must be in October/November 2017 at the beginning of the assignment of the Innovation Associates, one - after around 4 months (end 2017 or early 2018), and a final one - after around 7 months or towards the end of the assignment (March – May 2018). These must be organised as seminars / training events providing at least 2.5 days of learning sessions but not more than 3.5 days, excluding travel time. Each training seminar shall be planned well in advance as to allow the participation of all the target audience but also to reduce travel costs for the participants.

Each training seminar shall be provided in two or three identical sessions to allow for some flexibility on the side of the Associates.

At least one of these training seminars and not more than two (or a specific module within a seminar) should be open for the participation of up to 90 advisors of the Innovation Associates from the employing enterprises (ideally, but not necessarily, company managers). This may require splitting this particular seminar (or module) into several session in order to cope with the higher number of participants.

These events shall be complemented by shorter webinars on specific topics. An initial webinar programme shall be proposed but the final programme shall be open to modifications to cater for the needs and interests of the Innovation Associates, based on the experiences in enterprises.

Furthermore, a regular weekly community-building online event of at least 2 hours shall be organised, providing, among others, animated interaction as well as expert and peer support to address arising challenges.

The contractor is also expected to provide individual on-demand support to Innovation Associates on the subjects covered in the training, for example, by telephone or by e-mail.

The training environment and online resources will be set up from the starting date of the contract. The trainings will be provided to Innovation Associates in the period from 1 October 2017 to 30 June 2018.

Training content:

The following content must, as a minimum, be provided to all Innovation Associates:

- Definition of innovation (activities) according to the (OECD) 'Oslo-manual'¹³;
- Academic vs. industrial innovation logic; product, process, organisational innovation and business model innovation in practice;
- The formulation of industrial innovation projects and key performance indicators and innovation project monitoring;
- (Fundamentals of) management of Intellectual Property Rights for industrial innovation;

¹³ See <http://ec.europa.eu/eurostat/documents/3859598/5889925/OSLO-EN.PDF>

- Public support to financing innovation projects in SMEs;
- 'Open innovation' principles and cooperation management.

Furthermore, the following training content shall be provided to Innovation Associates as well as their advisers in the employing enterprise:

- The 'enterprise innovation management system' (according to CEN TS-16555);
- Assessment of innovation performance;
- Innovation strategy and innovation performance in start-ups and established companies.

Additional topics to be covered by webinars must include:

- The market for innovation management consultancy services;
- Specific trainings on all remaining elements of the enterprise innovation system as in TS-16555;
- Innovation policy;
- (Inter-) Cultural aspects of business organisation.

Finally, a specific session informing on European and national funding schemes shall be provided. However the training seminars/webinars shall not be provided as specific support to obtain financing and, consequently, tools and technique on how to write a project proposal are excluded.

The contractor will:

- Manage the full cycle of trainings from the initial invitation to collection of feedback;
- Provide a venue for the training seminars located within the European Union and not further than two hour's travel from an international airport with convenient connections across Europe. Different training seminars / sessions may be organised in different locations;
- Provide on-site catering for those training seminars organised entirely by the contractor (this is not applicable if an Enterprise Europe Network partner requests a training to be held at their location – in such cases, the latter is in charge of the logistics for the meeting).
- Make available all the training material used and ensure that it remains available to Innovation Associates and their employers until at least the end of 2018;
- Cover travel, accommodation and subsistence cost for their own staff or invited speakers acting as trainers or providing support to the trainings;
- Offer interested Innovation Associates the possibility to receive a certificate proving their successful participation in the training programme. This certificate should be based on the Innovation Associate passing an 'exam' developed by the contractor.
- Participate in contractual and operational meetings organised by EASME in Brussels according to the calendar in section 1.9.2. below.

Relevant EU staff may attend the training events organised for Innovation Associates (as observers).

1.5. INPUT BY THE CONTRACTING AUTHORITY

Lot 1

- EASME will provide the contractor with information about the eligible Enterprise Europe Network staff members who may receive trainings under the conditions set out in this Call.
- EASME will provide the necessary information about its own training programme for the Enterprise Europe Network throughout the contract if, and when, required.
- The contractor may be invited to participate in relevant information, training and community-building events organised for the Enterprise Europe Network.
- Travel and accommodation cost for Enterprise Europe Network staff members participating in the training events do not have to be covered by the contractor.

Lot 2

- EASME will provide the contractor with contact details and a suitable communication channel with the Innovation Associates and the SMEs funded under the European SME Innovation Associate – pilot.
- Travel and accommodation costs for the associates and advisors will be covered by the employing enterprises.
- The European SME Innovation Associate – pilot will be assessed in a study investigating its impact on the participating enterprises and Innovation Associates. This study will be carried out in parallel with the implementation of the European SME Innovation Associate – pilot. The contractor for Lot 2 therefore has to give access to the trainings to the contractor(s) carrying out the study for the latter to be able to interview the Innovation Associates. The contractor(s) for the study shall bear their own cost of travel and accommodation.

1.6. GENERAL GUIDANCE ON METHODOLOGY

Lot 1:

The proposed training and capacity building environment must make due reference to and fully take into account the nature of the innovation management support services of the Enterprise Europe Network as defined in the Horizon 2020 Work Programme, chapter 7 – Other Actions: Services in 2017/18 of the Enterprise Europe Network "enhancing the innovation management capacity of SMEs" and providing "key account management" to beneficiaries of the SME Instrument

It must also be in line with the definition of innovation and innovation management systems as set out in section 1.4 above, in particular CEN TS/16555-1 and the "Oslo Manual".

The proposal must provide:

- An indicative calendar for a training programme responding to the needs described above for the years 2017-2018;
- A methodology for the management of the training cycle;
- The conditions under which an organisation that is a partner in the Enterprise Europe Network can host a training;
- Reference to and explanations of the tool(s) and methodologies used for innovation management support to SMEs in the context of the actions described in this Call, as well as a clear description of how they are aligned with the technical standard CEN/TS 16555-1.

The proposal must include at least the following work packages:

- Work package 1: Training for staff members of the Enterprise Europe Network;
- Work package 2: Webinars / e-learning;
- Work package 3: Individual on-demand support to Enterprise Europe Network staff members;
- Work package 4: Project management.

Lot 2:

The proposed training programme must make due reference to and fully take into account the nature of the European SME Innovation Associate – pilot and must be in line with the definition of innovation management systems as set out in CEN TS/16555-1.

The proposal must provide:

- An indicative calendar for a training programme responding to the needs described above for the period referred to in section 1.4;
- A training strategy for the core training for the European SME Innovation Associate – pilot and a detailed description of the training content requested in section 1.4. above;
- A methodology for the management of the training cycle;
- A description of all thematic, logistic and management aspects of the training programme and its integration in the European SME Innovation Associate – pilot requested in this call.

The proposal must include at least the following work packages:

- Work package 1: Core training for innovation associates;

- Work package 2: Webinars;
- Work package 3: Individual on-demand support to Innovation Associates;
- Work package 4: Project management.

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 contractor.

Lot 1

Throughout the duration of the contract, up to 450 Enterprise Europe Network staff members are expected to have received up to four days of training per year on the topics described above. Since it is not compulsory for Enterprise Europe Network staff members to use their full annual training allowance in the context of this project, the contractor is expected to communicate efficiently in order to maximise awareness and demand.

A suitable training environment and implementation methodology will have been designed and implemented from the first day of the contract.

An analysis based on the feedback of Enterprise Europe Network staff members participating in the training, as well as statistics about the use of the programme, shall be provided to EASME on a quarterly basis. The satisfaction of trained staff members (as expressed in feedback surveys to be conducted by the contractor), as well as the coverage of the required content are important performance indicators for this lot.

Lot 2

Throughout the duration of the contract, up to 180 participants are expected to receive up to 12 days of training.

A suitable training environment and implementation methodology will have been designed and implemented from the first day of the contract.

The satisfaction of trained staff members (as expressed in feedback surveys to be conducted by the contractor), as well as the coverage of the required content are important performance indicators for this lot.

1.8. STARTING DATE OF THE CONTRACT AND DURATION

It is expected that the contract is signed approximately in December 2016.

Lot 1

The contract shall enter into force on 1 February 2017 if both parties have already signed by that date. Should the contract be signed later, it will enter into force on the date 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.

Lot 2

The contract shall enter into force on the date of its signature by the last contracting party. The duration of the tasks shall not exceed 18 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.

1.9. PLANNING, OUTPUTS AND DELIVERABLES

The contractor must provide the required deliverables and reports in accordance with the conditions of the draft service contract. When requested in the contract the deliverables and reports will accompany the invoices for payments.

Each report will be submitted in electronic format compatible with Word in English.

1.9.1. *Intermediate outputs and deliverables*

Lots 1 and 2

The Interim Progress Report shall include at least the following:

- Detailed description of the activities carried out until the due date of the interim report
- Description of the training environment put at the disposal of Enterprise Europe Network staff members / Innovation Associates
- Outline of the training courses delivered so far and planned for the future
- Statistics on the participation in the training programme and on feedback
- Outlook on the activities to be performed in the forthcoming period
- An analysis of obstacles encountered and identified risks, as well as a mitigation strategy.

Throughout the course of the project, EASME expects to receive the following deliverables at the appropriate stage of implementation:

- Planning and calendar for all actions
- A training plan outlining the nature of the programme, the content of different courses, capacity, etc.
- An indicative training timetable
- Regular feedback reports on the training programme
- Organisation of the training events according to the agreed calendar and content

1.9.2. *Final outputs and deliverables*

The draft Final Report shall include all the elements specified in sections 1.4 - Tasks:

Since the main objective of this call for tender is the provision of training, the Final Report shall be a technical one outlining the activities and achievements of the contractor in the execution of the project.

Lot 1

Timetable (months/weeks/days)	Meetings	Actions/Deliverables
Month 1		Start date of the contract
Month 1	Kick-off meeting	
Month 6	1 st operational project meeting (Brussels)	
Month 12	Interim contractual meeting	<i>Interim Progress Report</i> <i>Submission of the invoice for interim payment</i>
Month 17	2 nd operational project meeting (Brussels)	
Month 24	Final report meeting	<i>Final Report</i> <i>Submission of the invoice for the balance payment</i>

Lot 2

Timetable (months/weeks/days)	Meetings	Actions/Deliverables
Month 1		Start date of the contract
Month 1	Kick-off meeting	
Month 3	1 st operational project meeting (Brussels)	
Month 6	2 st operational project meeting (Brussels)	
Month 10	Interim contractual meeting (Brussels)	<i>Interim Progress Report</i> <i>Submission of the invoice for interim payment</i>
Month 14	3 rd operational project meeting (Brussels)	
Month 18	Final report meeting	<i>Final Report</i> <i>Submission of the invoice for the balance payment</i>

2. INFORMATION ON TENDERING (APPLICABLE TO BOTH LOTS UNLESS OTHERWISE SPECIFIED)

2.1. 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.

2.2. 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.

2.3. 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/EU¹⁴.

2.4. 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.

2.5. 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

¹⁴ 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).

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 20% or whose capacity is necessary to fulfil the selection criteria.

2.6. 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.

2.7. CONTENT OF THE TENDER

- The tenders must be presented as follows:
- Part A: Identification of the tenderer (see Section 2.8)
- Part B: Non-exclusion (see Section 3.2)
- Part C: Selection (see Section 3.3)
- Part D: Technical offer (including Annex 6)

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 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.

- Part E: Financial offer (Annex 7)

The **price for each lot** 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.
- The cost of catering shall be included in the quoted price but it will not be taken into account in the evaluation of the tenders (see section 3.5 Ranking of tenders).

2.8. 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 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) 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.

<h2>3. EVALUATION AND AWARD</h2> <p>(APPLICABLE TO BOTH LOTS UNLESS OTHERWISE SPECIFIED)</p>
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3.1. 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.

3.2. 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 20 % or whose capacity is necessary to fulfil the selection criteria 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 20% 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.

3.3. 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.

3.3.1. 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 3.2) so only one declaration covering both aspects should be provided by each concerned entity.

The contracting authority will **evaluate selection criteria only on the basis of the declarations on honour (Annex 3), the information included in the tables in Annex 2.1. and Annex 2.2. fully completed and the evidence provided.** 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 may 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.

3.3.2. 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.

3.3.3. 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 closed¹⁵ shall amount to at least one and a half times the volume of the market per lot, 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 submit a Statement of Turnover in accordance with Annex 2.1** of these tender specifications completed with the information requested.

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.

3.3.4. 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 for both lots 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/five years, with the sums, dates and clients, public or private, accompanied by statements issued by the clients.

¹⁵ In the case of joint tender or identified sub-contractors, the turnover must be provided for the same two years for all the partners/subcontractors.

Lot 1:

Criteria	Evidence
✓ <i>Criterion A1: The tenderer must prove experience in the field of provision of training and capacity building in innovation management to business advisers.</i>	✓ Evidence A1: the tenderer must provide references for a project/projects delivered in these fields (both fields must have been covered) in the last five years, with a minimum value of € 700,000 each, and a minimum combined total duration of three years.
✓ <i>Criterion A2: The tenderer must prove capacity to work in English.</i>	✓ Evidence A2: the tenderer must provide references for one project delivered in the last three years showing the necessary language coverage.
✓ <i>Criterion A4: The tenderer must prove its capacity to work on projects covering a large number of countries at the same.</i>	✓ Evidence A4: the tenderer must provide references for at least one project delivered in the last five years covering at least 25 countries at the same time.

Lot 2

Criteria	Evidence
✓ <i>Criterion A1: The tenderer must prove experience in the field of the provision of training and capacity building in the area of innovation management in academic and industrial contexts</i>	✓ Evidence A1: the tenderer must provide references for a project/projects delivered in these fields (both fields must have been covered) in the last five years, with a minimum value of € 400 000 each, and a minimum combined total duration of three years.
✓ <i>Criterion A2: The tenderer must prove capacity to work in English.</i>	✓ Evidence A2: the tenderer must provide references for one project delivered in the last three years showing the necessary language coverage.
✓ <i>Criterion A3: The tenderer must prove capacity to draft reports in English.</i>	✓ Evidence A3: the tenderer must provide one document of at least 10 pages (report, study, etc.) in this language that it has drafted and published or delivered to a client in the last two years. The verification will be carried out on 5 pages of the document.

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.

Lot 1

Criteria	Evidence
✓ <i>B1 - Project Manager: At least five years' experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in a project of a similar size (at least € 700,000), with experience in management of a team of at least 4 people.</i>	✓ Evidence B1 - CV
✓ <i>B2 - Language quality check: All members of the team should have at least C1 level in the Common European Framework for Reference for Languages in English.</i>	✓ Evidence B2 - A language certificate or past relevant experience
✓ <i>B3 - Expert in innovation management assessment and training: Relevant higher education degree in innovation, business or economic studies or equivalent professional experience of five years and at least five years' professional experience after obtaining the degree/after the equivalent professional experience.</i>	✓ Evidence B3 – CV

Lot 2

Criteria	Evidence
✓ <i>B1 - Project Manager: At least five years' experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in a project of a similar size (at least € 400,000) , with experience in management of a team of at least 4 people.</i>	✓ Evidence B1 - CV
✓ <i>B2 - Language quality check: All members of the team should have at least C1 level in the Common European Framework for Reference for Languages in English.</i>	✓ Evidence B2 - A language certificate or past relevant experience
✓ <i>B3 - Expert in training of professionals in innovation-related areas and knowledge transfer: Relevant higher education degree in innovation, business or economic studies or equivalent professional experience of five years and at least five years' professional experience after obtaining the degree/after the equivalent professional experience.</i>	✓ Evidence B3 – CV

3.4. 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 points of the maximum possible mark for the whole quality evaluation or less than 50 points for one 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.

Lot 1

Criteria	Points
<p>✓ <i>Quality of the proposed methodology</i></p> <p><i>This criterion will assess, inter alia:</i></p> <ul style="list-style-type: none"> – <i>Quality and credibility of the proposed approach;</i> – <i>Compliance with TS-16555 as basic model and range of trainings proposed to cover all elements of the enterprise innovation management system;</i> – <i>Coverage of additional aspects of capacity building for the Enterprise Europe Network in the area of innovation management in the trainings;</i> – <i>Quality of the proposed training approach (including diversity of training formats, responsiveness to needs, marketing of training offers to Enterprise Europe Network staff and proposed management of events);</i> – <i>Quality of the individual ad-hoc support offer.</i> 	50 points
<p>✓ <i>Organisation of the work and resources</i></p> <p><i>This criterion will assess how the roles and responsibilities of the proposed are distributed for each task. It also assesses the global allocation of time and resources to the project and to each task or deliverable, and whether this allocation is adequate for the work. The tender must provide details on the allocation of time and human resources and the rationale behind the choice of this allocation. Details should be provided as part of the technical offer.</i></p>	30 points
<p>✓ <i>Quality control measures</i></p> <p><i>This criterion will assess the quality control system applied to the service foreseen in this tender specification concerning the quality of the deliverables, the language quality check, and continuity of the service in case of absence of the member of the team. The quality system must be detailed in the tender and specific to the tasks at hand; a generic quality system will result in a low score.</i></p>	20 points

Lot 2

Criteria	Points	
<p>✓ <i>Quality of the proposed methodology</i></p> <p><i>This criterion will assess, inter alia:</i></p> <ul style="list-style-type: none"> – <i>Quality and credibility of the proposed approach;</i> – <i>Compliance with TS-16555 as basic model and range of trainings proposed to cover all elements of the enterprise innovation management system;</i> – <i>Coverage of 'industrial innovation opportunities' (business model innovation, organisational innovation) normally outside the scientific-technological focus (unlike product and process innovation);</i> – <i>Quality of the proposed training approach (including diversity of training formats, responsiveness to needs, marketing of training offers and proposed management of events);</i> – <i>Quality of the individual ad-hoc support offer to Innovation Associates.</i> 	50 points	
<p>✓ <i>Organisation of the work and resources</i></p> <p><i>This criterion will assess how the roles and responsibilities of the proposed are distributed for each task. It also assesses the global allocation of time and resources to the project and to each task or deliverable, and whether this allocation is adequate for the work. The tender must provide details on the allocation of time and human resources and the rationale behind the choice of this allocation. Details should be provided as part of the technical offer.</i></p>	30 points	
<p>✓ <i>Quality control measures</i></p> <p><i>This criterion will assess the quality control system applied to the service foreseen in this tender specification concerning the quality of the deliverables, the language quality check, and continuity of the service in case of absence of the member of the team. The quality system must be detailed in the tender and specific to the tasks at hand; a generic quality system will result in a low score.</i></p>	20 points	

3.5. 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 for each lot¹⁶.

$$\text{score for tender X} = \frac{\text{cheapest price}}{\text{price of tender X}} * 100 * \text{price weighting (30\%)} + \frac{\text{total quality score (out of 100) for all award criteria of tender X}}{\text{total quality score (out of 100) for all award criteria of tender X}} * \text{quality criteria weighting (70\%)}$$

The tender ranked first after applying the formula will be awarded the contract.

3.6. 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.

4. 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. – Economic and financial capacity
- 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: Financial offer (price and breakdown of costs)

Annex 8: Checklist for Submission

¹⁶ The price used for the ranking of the tenders is the price quoted under "A. Total price used for the assessment of the financial offer" in Annex 7 "Price and breakdown of costs".