



**EUROPEAN COMMISSION**  
Executive Agency for Small and Medium-sized Enterprises (EASME)  
Department A  
Unit A.1 – COSME

## **CALL FOR TENDERS**

### **SME POLICY OUTREACH ACTIVITIES, IN PARTICULAR, ORGANISATION OF SME ASSEMBLY, SME WEEK AND EUROPEAN ENTERPRISE PROMOTION AWARDS**

**EASME/COSME/2017/020**

**TENDER SPECIFICATIONS**

***Open Procedure***

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EASME/COSME/2017/020

**SME POLICY OUTREACH ACTIVITIES, IN PARTICULAR, ORGANISATION OF SME ASSEMBLY, SME WEEK AND EUROPEAN ENTERPRISE PROMOTION AWARDS**

**1. TECHNICAL SPECIFICATIONS**

**1.1. INTRODUCTION**

The Executive Agency for Small and Medium-sized Enterprises (henceforth "EASME" or "the Contracting Authority")<sup>1</sup>, acting under the powers delegated by the European Commission, is launching this invitation to tender for carrying out SME policy outreach activities, in particular, the organisation of the SME Assembly, the SME Week and the European Enterprise Promotion Awards.

This tender is launched on behalf of the Directorate General for the Internal Market, Industry, Entrepreneurship and Small and Medium-sized Enterprises (hereinafter "DG GROW") and its directorate for SME policy (GROW.H1). It is based on the Programme for the Competitiveness of Enterprises and small and medium-sized enterprises (COSME) (2014-2020) (hereafter "COSME")<sup>2</sup>, in particular, on the **COSME Work Programme for 2017**, action GROW/SME/17/C/01 SME Policy (SME Performance Review, Start-ups, Outreach)<sup>3</sup>.

The tender covers the organisation of major small and medium-sized enterprises (SMEs) policy events in 2018, with a possibility to renew the contract each time for one year to cover the same tasks in 2019 and 2020, conditional on the COSME Work Programmes 2019 and 2020, and provided the contractor's performance is satisfactory.

EASME is responsible for the budgetary, contractual and legal aspects of this tender, whilst the day-to-day management and any content related issues will be dealt with by staff from DG GROW.H1 in close cooperation with EASME.

**1.2. BACKGROUND INFORMATION AND CONTEXT**

In view of the fact that more than 95% of European enterprises are SMEs, the European Commission, and more specifically DG GROW, puts SMEs at the centre of its economic policy.

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

<sup>2</sup> Regulation (EU) n°1287/2013 of the European Parliament and of the Council of 11 December 2013 establishing a Programme for the Competitiveness of Enterprises and small and medium-sized enterprises (COSME) (2014-2020) and repealing Decision N°1639/2006/EC, Official Journal of the European Union, L347 of 20.12.2013, p.33.

<sup>3</sup> Commission implementing decision of 1 February 2017 amending the Commission Implementing Decision C(2016) 7033 concerning the adoption of the work programme for 2017 and the financing for the implementation of the Programme for the Competitiveness of enterprises and small and medium-sized enterprises.

The central policy document for SME policy as a whole is the Small Business Act<sup>4</sup> (hereinafter "SBA"), a set of actions and political orientations governed by the principle of "Think Small First".

All tasks covered by this tender form part of and support the SME policy of the European Commission, in particular the implementation of the SBA and the Start-up and Scale-up initiative "Europe's next leaders"<sup>5</sup>. The tasks form part of the Commission's outreach towards relevant public authorities and entrepreneurs, as well as academia, business support organisations and media.

The SBA, adopted in 2008 and revised in 2011, sets out a comprehensive framework for action to help SMEs. It is based on ten guiding principles and a wide range of policy actions to be undertaken by both the Commission and Member States. The review of the SBA in 2011 put in place a simple system of governance to ensure the implementation of the SBA principles and actions: a Network of SME Envoys and the SME Assembly (SBA Conference).

In November 2016 the Commission adopted the above-mentioned initiative for start- and scale-ups with the intention to complement its SME policy and give the young and faster-growing companies a specific focus.

The **Network of SME Envoys** is composed of high-level representatives of public administration or ministries of the Member States. All Member States have followed the Commission's request to appoint a national SME Envoy. The Envoys are supported by Sherpas from their national administrations, who work closely together with the secretariat of the Network (currently GROW.H1). The Network of SME Envoys is chaired by the EU SME Envoy, currently a Member of the European Commission. The Network will hold a meeting in parallel with, and also participate in parts of the public debates during, the SME Assemblies.

The **SME Assembly** aims to take stock every year of the progress made in implementing the SBA, and to highlight and publicise good practice examples. It provides the framework for representatives of public authorities, SMEs and their organisations and other policy makers to discuss the orientation of SME policy in the EU and on a national level. It is a de facto meeting of 'everybody who matters' in the policy for SMEs in Europe. 2018 will be the seventh time that this conference will be held. The task is to ensure that the Assembly – through its delegates, programme and quality of the content – continues to be 'the place to be', also beyond organisations and persons attending, especially for organisations or individuals active in the sphere of SME policy who could contribute with successful innovative solutions and creative thinking. One of the overarching aims is to interconnect the relevant actors of all levels and to remove information/communication flow bottlenecks in the SME/entrepreneurship ecosystem.

Other very important elements of SME policy outreach are:

- The **European Enterprise Promotion Awards (EEPA)**;
- The **SME Week**, an umbrella brand for hundreds of events on national (and sub-national) level;
- The **Single Market Forum annual events** to exchange best practices between stakeholders, inform citizens, and/or examine the state of the Single Market;

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<sup>4</sup> Communication from the Commission to the Council, the European Parliament, the European Economic and Social Committee and the Committee of the Regions - "Think Small First" - A "Small Business Act" for Europe {SEC(2008) 2101} {SEC(2008) 2102}

<sup>5</sup> Communication from the Commission, COM(2016)733.

*NB: The Single Market Forum events as such are not part of this tender and the contractor will not be asked to organise these events; the contractor will only have to coordinate the events in as much as they are labelled as SME Week event like any other event with this label.*

- The **Ideas from Europe Initiative**<sup>6</sup> for European entrepreneurs with business ideas that help solving societal challenges.

*NB: This contract does not cover activities related to this initiative other than the necessary coordination and linking between the activities covered by this contract with those of Ideas from Europe.*

### **European Enterprise Promotion Awards:**

Now in their 11th year, the **EEPA** recognise and reward outstanding initiatives that support entrepreneurship at national, regional and local level. These awards are not only a competition; they also aim to raise awareness of enterprise, both policy and delivery activities, and celebrate success in promoting entrepreneurship. The success stories identified through the Awards are promoted throughout Europe and beyond as role models of how public authorities at national and regional level have driven and implemented creative entrepreneurship-friendly practice.

The objectives of the EEPA are:

- to identify and recognise successful activities and initiatives undertaken to promote enterprise and entrepreneurship;
- to showcase and share examples of best entrepreneurship policies and practices;
- to create a higher awareness of the role entrepreneurs play in society;
- to encourage and inspire potential entrepreneurs.

There are two selection stages to qualify for the European Enterprise Promotion Awards. The first step comprises national selection processes<sup>7</sup> in the participating countries<sup>8</sup>. Only by completing the national selection stage can entrants be considered for the European Awards. Each participating country nominates up to two projects for the European level.

#### **Indicative yearly time-frame for 2018 to 2020**

- January : Launch of the new round of the Awards
- March to April : Deadline for receipt of entries at national level
- June: Deadline for receipt of entries at European level

<sup>6</sup> [www.ideasfrom.eu](http://www.ideasfrom.eu)

<sup>7</sup> As a reference, each year more than 350 organisations compete in the national round of the awards.

<sup>8</sup> Countries participating in the COSME programme at the present time are EU Member States, Iceland, Montenegro, FYROM, Turkey, Albania, Serbia, Bosnia and Hercegovina, Armenia, Ukraine and Moldova. If other countries participate in the future, this would have minimal implications on the running of the competitions since translations are only required for EU Member States' official languages (except Gaelic and Maltese). Therefore, additional translation requirements would only become necessary if a candidate country became a Member of the EU within the time-frame of the contract.

- July or September: European jury meeting
- 2nd half October/November: Award Ceremony and SBA Conference/SME Assembly/European SME Week

### *Jury*

The nominations to the European level are reviewed by a high profile jury made up of permanent and non-permanent members representing academia, business organisations, entrepreneurs, national administrations, the European Commission, the spring and autumn Council presidencies, the Committee of the Regions, and the winner of the previous year's Grand Jury Prize.

A shortlist is published soon after the jury meeting, publicising the projects that have been selected by the jury. It is proposed that the EEPA Jury selects a maximum of three projects per category for the shortlist.

The national SME Envoys will be invited to participate actively in the national selection process, as well as, the awards ceremony.

Final results are announced at the ceremony co-organised by the European Commission, the Committee of the Regions and the country holding the EU Presidency at the time. The Jury might also award up to three special mentions.

### *Entries*

Each year, more than 350 national, regional and local authorities – including towns, cities, regions and communities, as well as, public-private partnerships between public authorities and entrepreneurs, educational programmes and business organisations – compete in the national round of the awards. Participating countries – currently EU Member States, Iceland, Montenegro, FYROM, Turkey, Albania, Serbia, Bosnia and Hercegovina, Armenia, Ukraine and Moldova – can select up to two candidates for the European competition. The candidates must show how their actions have demonstrably facilitated business and boosted their region's economy during the two-year period prior to the Award year. Joint nominations from more than one country for cross-border initiatives can also be accepted, as long as, they are supported by all countries involved.

### *Categories*

There are different award categories to recognize the local or regional initiatives that are successfully driving forward their enterprise performance:

1. **Supporting the development of green markets and resource efficiency:** recognises policies and initiatives at national, regional or local level that support SME access to green markets and help to improve their resource efficiency through, for example, green skills development and matchmaking, as well as, funding;  
*NB: This category has been suspended in 2017 due to a lack of suitable projects in earlier years.*
2. **Promoting the entrepreneurial spirit:** recognises initiatives at national, regional or local level that promote an entrepreneurial mind-set especially among young people and women;
3. **Investing in entrepreneurial skills:** recognises initiatives at regional or local level to improve entrepreneurial and managerial skills;

4. **Improving the business environment:** recognises innovative policies at national, regional or local level which promote enterprise start-up and GROW, simplify legislative and administrative procedures for businesses and implement the “Think Small First” principle in favour of SMEs;
5. **Supporting the internationalisation of business:** recognises policies and initiatives that encourage at national, regional or local level enterprises and particularly, small and medium-sized businesses, to benefit more from the opportunities offered by markets both inside and outside the European Union;
6. **Responsible and inclusive entrepreneurship:** recognises national, regional or local initiatives by authorities, or public/private partnerships that promote corporate social responsibility among SMEs. This category will also recognise efforts to promote entrepreneurship among disadvantaged groups, such as, unemployed, legal migrants, disabled or people from ethnic minorities.

The European Jury also awards the **Grand Jury prize** to the entry that is considered the most creative and inspiring initiative promoting entrepreneurship; this entry is chosen among entries which have not won in a category.

*NB: the categories might be adapted and modified in line with political objectives by the time of the signature of the contract pursuant to this tender. Modifications and adaptations may also happen during the course of the contract for the following round of EEPA; the decision will be taken by DG GROW after consultation with the contractor. Tenderers are encouraged to present proposals for the review of the categories, in particular category 1, as mentioned above, bearing in mind the timing of each EEPA round.*

#### *Campaign*

Case studies of all the nominees’ initiatives are published, making these best practices available to the widest possible public. A media relations campaign publicises the nominees, placing them under the spotlight. Media activities take place at both the national and European levels to ensure that winners receive the recognition that they deserve within their own constituencies, as well as, in key European media.

#### *Ceremony*

The 2018 to 2020 SME Assemblies and the EEPA ceremonies are envisaged to take place in the autumn (late October to mid-November) and are planned to be co-hosted by the EU Presidency at that time, i.e. Austria, Finland and Germany, respectively. In order to be able to communicate with local service providers, etc., the contractor shall indicate how they intend to cover the languages in their team with (temporary) staff.

All entrants nominated by their country for the EEPA benefit through their invitation to the awards ceremony which gets them in touch with media and policy makers and gives interesting possibilities to network.

#### **Indicative yearly timeline for the SME Assemblies and the EEPA ceremonies**

Without prejudice to the agreement between the Commission and the respective EU Presidency:

- the 2018 event is taking place in Graz
- the 2019 event is taking place in Finland, likely in Helsinki
- the 2020 conference might take place in Berlin or another bigger town in Germany.

*NB. The decision on the towns will depend on the availability of international air travel and conference venues, as well as, on other considerations of the Presidency country. The contractor will be involved in the discussions and might be asked to assist the decision making with technical assessments.*

### **European SME Week:**

The **European SME Week**<sup>9</sup> is a pan-European umbrella campaign to inform entrepreneurs about available support at EU and national, regional and local level and to encourage more Europeans to become entrepreneurs.

The objectives of the SME Week are to:

- provide information on what the EU and national, regional and local authorities are offering as support to micro, small and medium-sized businesses;
- promote entrepreneurship so that more Europeans, and in particular, younger ones, seriously consider becoming an entrepreneur as a career option;
- give recognition to entrepreneurs for their contribution to Europe's prosperity, jobs, innovation and competitiveness.

The European SME Week is a chance for organisations providing business support to make their services known to entrepreneurs and benefit from the general publicity of the Week. Whereas most of the events and activities taking place under the European SME Week umbrella are organised on the national, regional or local level by business organisations, support providers, regional and local authorities and other organisations supporting small businesses throughout Europe, an EU-level central event is organised by the Commission.

The Commission provides the event organisers with the branding and the promotion of their events via a central website located on Europa<sup>10</sup>. In 2010, 2011 and 2012 about 1500 national, regional and local events were organised in the 37 participating countries within the framework of the European SME Week.

The contact and coordination between the European Commission and the event organisers in the participating countries is done via the national coordinators. In every country, two coordinators are appointed, one from a state institution and one from private business. The national coordinators meet twice a year with the European SME Week team of the Commission to be informed about the plans and initiatives of the Commission, to make proposals for the upcoming SME Week, to report about plans or events that were organised, etc.

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<sup>9</sup> <http://ec.europa.eu/sme-week>

<sup>10</sup> <http://ec.europa.eu/growth/tools-databases/sme-week/index.cfm?fuseaction=sme.addEvent&lng=en>

It should be noted that, although there is a specific date for the European SME Week (i.e. the week of the SME Assembly), the initiatives in various Member States happen throughout the year. The overarching motto of the SME Week is therefore 'Every Week is SME Week'. Yearly mottos can be suggested by the contractor.

It is expected that the support to both the EEPA and SME Week national coordinators constitutes a real added value for them and helps outreach initiatives. To this end the offer shall describe practical yet innovative and creative means of possible support to the national coordinators based on a coherent image and communications and outreach plan.

DG GROW cooperates also with GEN, the Global Entrepreneurship Network, which organises the Global Entrepreneurship Week (normally the 3<sup>rd</sup> week in November); **tenderers are encouraged to suggest synergies to enhance this cooperation.**

### **Showcasing 'Secrets of Success':**

To showcase European entrepreneurs and their 'secrets of success', the **Secret of Success brochure**<sup>11</sup> highlights both the challenges and the excitement of entrepreneurship as a career choice and thus encourages the general public to consider being self-employed as a realistic and attractive career option. Initially on paper, the brochure is now available in all official EU languages (except Gaelic and Maltese) on the website in a printable format. It describes in a graphic, attractive way the benefits and challenges of being an entrepreneur. For the current tender the presentation of entrepreneurial success stories will be agreed with the contractor, to make sure the approach is adapted to the needs; this may also take the form of several smaller leaflets, each with a smaller number of success stories. Tenderers are encouraged to include suggestions to that end in their offer, taking into consideration the #InvestEU campaign<sup>12</sup>.

For information: The different themes of the brochure were:

- 2009: Tips from European Entrepreneurs
- 2010: The Many Faces of European Entrepreneurship
- 2011: Entrepreneurship beyond Start-ups: Second Time Entrepreneurs and Transfer of Businesses
- 2012-13: European SMEs as International Champions
- 2016-17: Inspiring a new generation of entrepreneurs

### **Single Market Forum:**

Since the merger of parts of the former DG MARKT with the former DG ENTR, synergies have also been created between the SME Week and the **Single Market Forum**. Both initiatives seek to improve the environment for Europe's businesses within the Internal Market, through events organised on national, regional or local level by business organisations and/or national and local authorities. The SME Week and the Single Market Forum are now being managed by the same team in the European Commission, in order to exploit the synergies and co-brand some events.

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<sup>11</sup> <http://blogs.ec.europa.eu/promotingenterprise/tag/secret-of-success/>

<sup>12</sup> <https://europa.eu/investeu/>

The organisation of the Single Market Forum is not part of this contract, but the results and discussions of the annual Forum will be integrated into the outreach activities and inform the content of the SME Assembly.

### **Ideas from Europe:**

**Ideas from Europe**<sup>13</sup> was initiated in 2015. After an EU-wide search, entrepreneurs with potential solutions to global challenges were selected to share their ideas on the *TEDxBinnenhof* stage on March 31st 2016.

All kinds of stakeholders, such as, citizens, scientists, authorities, NGOs, established and new businesses, were inspired to actively share their knowledge, experience and network in the period after the event. Because of the huge success, a second round of Ideas from Europe was started in April 2017. It is planned that a third round of Ideas from Europe be launched in 2019. The operation of the initiative is not part of this tender. However, the **tenderers are encouraged to present proposals on how to better integrate this initiative with the activities covered by this tender.**

### **1.3. GENERAL AND SPECIFIC OBJECTIVES**

At the heart of the European SME policy is the conviction that achieving the best possible framework conditions for SMEs depends first and foremost on society's recognition of entrepreneurs. The general climate in society should lead individuals to consider starting their own business an attractive option, and acknowledge that SMEs contribute substantially to employment GROW and economic prosperity. As a key contribution to achieving an SME-friendly environment, the perception of the entrepreneurs as risk-taking individuals in the EU will have to change: entrepreneurship and the associated readiness to take risks should be applauded by political leaders and media, and supported by administrations. Being SME-friendly should become mainstream policy, based on the conviction that rules must respect the majority of those who will use them: the "Think Small First" principle. It is in that spirit that outreach activities like the ones covered by this contract are organised by the European Commission.

EASME wishes to enter into a **service contract** for the provision of the following services:

1. The conference organisation for the yearly SBA conference called the SME Assembly, generally organised in the second half of every year in cooperation with the Council Presidency of that period. The SME Assembly is organised in this form since 2012 and more information can be found on [http://ec.europa.eu/GROW/smes/business-friendly-environment/small-business-act/sme-assembly/index\\_en.htm](http://ec.europa.eu/GROW/smes/business-friendly-environment/small-business-act/sme-assembly/index_en.htm)
2. The organisation of a secretariat function for the European Enterprise Promotion Awards, the yearly award scheme organised since 2006 to award excellence in promoting entrepreneurial activities. More information is available under [http://ec.europa.eu/GROW/smes/support/enterprise-promotion-awards/index\\_en.htm](http://ec.europa.eu/GROW/smes/support/enterprise-promotion-awards/index_en.htm)
3. The organisation of a secretariat function for the SME Week, an umbrella for hundreds of SME related outreach activities on EU level and in Member States and beyond. See for further details: <http://ec.europa.eu/GROW/smes/support/sme-week>

Further, the contractor will be asked to:

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<sup>13</sup> <https://ideasfrom.eu/>

- Design and implement a holistic and innovative outreach and engagement strategy for all activities forming part of the contract (i.e. the design of the events/initiatives themselves, as well as, the shape and form of the related promotional activities);
- Propose a concept for the showcasing of secrets of success as mentioned above, and produce it, in principle, in a digital form.

The target audiences for all these activities range from the general public in the European Union to specific audiences, such as, European SME owners, business organisations, academia and media, depending on the concept and purpose of each task.

All tasks are supported by the following networks:

- From EU Member States, the network of SME Envoys. The work of each SME Envoy is also supported by a Sherpa.
- From all participating countries (COSME countries), a network of SME Week and EEPA national coordinators.

These persons form the prime cooperative network for all activities and are managed by DG GROW.H1. The contractor, who will receive all necessary contact details, can rely on the national co-ordinators and will actively support these groups and their members in accordance with the tasks described below.

All these activities are to be seen as a complete solution to outreach activities related to SME policy. The contractor will be charged with tasks that relate to these activities, but must always have the mind-set that they are holistic and interconnected. The overall political intention is the promotion of SMEs and entrepreneurship and better interconnection of relevant actors in the ecosystem.

The tasks will be informed and guided by a dedicated outreach team in DG GROW's directorate for Competitiveness and SMEs (GROW.H.), which acts as main interlocutor with the various networks of national coordinators on all content (see further below for details) and will follow closely the work of the contractor.

#### **1.4. TASKS AND GEOGRAPHICAL SCOPE**

##### **1.4.1. Tasks**

###### *1.4.1.1. Outreach and engagement strategy*

The contractor will develop an outreach and engagement strategy that embraces the three main activities (SME Assembly, EEPA, SME Week). The objectives of this task are:

- raising awareness of the importance of SMEs for Europe's economy among policy makers, non-SME stakeholders and the general public, in particular, but not exclusively through the use of modern (social) media channels;
- presenting the activities described in this document as part of a holistic SME policy outreach approach, also in relation to the Start- and Scale-up Initiative (see above).
- producing and promoting success stories from SMEs, enterprise promoters (i.e. incubators, stakeholder organisations and the like) and institutions;

The strategy must capture the SME/entrepreneur landscape and provide analysis of the current positioning of the three activities/events within the European and worldwide context; it shall

also provide possible directions and steps on improving/repositioning for achieving the political aims.

The strategy must cover the whole duration of the contract; it has to be sufficiently concrete to allow its implementation from the beginning of the contract period and sufficiently flexible to allow necessary adaptation throughout the contract duration, in case of important policy changes, insofar as they are not triggering a need to modify the contract. The strategy shall avoid print supports, where possible.

The main focus of the strategy is not to promote individual policy initiatives or actions from the European Commission, but to foster the whole enterprise ecosystem, based on the principles of the SBA, and to support the exchange of best practices and dissemination of success stories.

The strategy will also have to contain a clear and focused element of monitoring to verify its impact. This has to be integrated in the monitoring and ex-post evaluation of the individual activities themselves. The strategy will also have to include the use of modern engagement tools on social media, such as, influencer marketing and management. In particular, the promotional activities described below are part of the strategy.

For the implementation of the strategy and throughout the whole duration of the contract the contractor will proactively liaise with policy/project officers of the European Commission and EASME, and other European institutions, as well as, stakeholder organisations in close cooperation with the outreach team of GROW.H1. This will include other Commission services such as, DG Research & Innovation (DG RTD) and DG Connect (DG CNECT), involved in the implementation of the Start- and Scale-up Initiative (see above), as well as social media accounts maintained by these services.

#### *1.4.1.2. Promotional activities*

Active promotion of SBA themes via a coherent media strategy (traditional and digital, including social media<sup>14</sup>) through:

- The promotion, particularly but not exclusively, of SME Assembly themes and results, EEPA participants (winners and shortlisted) and the most important events of the SME Week):
  - SME Assembly, i.e. informing the public before and during the event about main subjects discussed, speakers, participants and the event itself;
  - EEPA, i.e. informing about national competitions (in cooperation with national organisers), national winners, jury meetings and the shortlist at all stages of the process before the award ceremony, as well as, afterwards; engaging with shortlisted and winners, as well as, local and regional media (from the regions the projects hail from); promoting the awarded/shortlisted projects as best practice; showcasing and giving the awarded initiatives a platform for their promotion;
  - SME Week, i.e. informing about individual events, in particular the national flagship events, themes discussed and results; pushing the message that "every week is SME week".
  
- Suggestions and regular updates (visual elements and text) for the Commission websites<sup>15</sup> and DG GROW social media channels relative to the various activities; a

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<sup>14</sup> The contractor will receive all access codes to social media sites at the beginning of the contract and transfer them to the Commission and EASME at the end of the contract as well as during the course of contract if needed.

dedicated conference website hosted by the contractor can be proposed by the contractor;

- Creating, transmitting to the Commission and updating of lists of opinion leaders, stakeholders and potential multipliers for individual and generic promotion activities and suggestions for regular contact with and proactive implication of these persons;
- Suggestions of ways in which selected entrepreneurs and other participants in the events governed by this contract could act as "ambassadors" or multipliers, for example, advertising the activities or best practices in their blogs, professional and social networks, being invited to speak at events during the SME Week, etc. Additionally, the contractor shall advise these "ambassadors" on their role and messages that they could pass on in their representation capacity;
- The proposal for an (electronic) replacement for the "Secret of Success" brochures produced in earlier years; this element of the outreach strategy should allow featuring successful entrepreneurs and provide material for social and other media channels. This brochure or its replacement needs to be translated into all EU official languages (except Maltese and Gaelic);
- Constant social media activity for the whole duration of the contract, adapted to the activities undertaken at any given moment. To that end the contractor will nominate specific persons who act as "social media champions" and take responsibility for the social media activity throughout the duration of the contract;
- Languages: If not specified otherwise, all activities related to this task need to be provided in EN and where applicable, in FR and DE, as well as, in the language(s) of the Presidency country.

#### Key performance indicators for this task

- ✓ Increase of 5% p.a. of the followers of the existing Twitter and Facebook accounts with a high active engagements (retweets and posts/share);
- ✓ Increase of the viewings of the YouTube channel to at least a number equivalent to the participants in the Assembly for the highlights videos and to at least 150 views for individual videos about EEPA winners.
- ✓ Media impact will be measured by number of "mentions" in any media channel other than those of the European Commission, the Council Presidency or those governed by this contract; the media impact will be considered satisfactory if:
  - a) in every country of a EEPA winner the fact of winning the award is mentioned at least twice in different media and;
  - b) if the overall number of mentions of any of the tasks governed by this contract is at least equal to twice the number of countries participating in the EEPA and SME Week; a mention in the print and online format of the same media will be considered as one mention.

<sup>15</sup> The uploading of new or corrected existing elements is not included in this contract; the elements have to be ready for uploading, proof-read and spell-checked; the uploading itself will be done by webmasters of DG GROW.

**1.4.1.3. Media monitoring**

The contractor will undertake a detailed media monitoring (print, TV, radio, online) to measure the impact of the tasks under this contract during its whole duration, in particular, during two months around the award ceremony and SME Assembly and after other milestones, such as, the EEPA launch, jury meeting and publication of shortlisted candidates and winners of any media mentioning the EEPA, the SME Assembly or the SME Week as a whole or parts thereof. The monitoring will be part of a monthly report in electronic form.

**1.4.1.4. Visual identity/graphic theme**

The contractor will develop an annual graphic theme and guidelines within the framework of, and fully respecting, the Commission’s visual identity guidelines (see section 2 of these tender specifications), taking equally into account the graphic presentation of the #InvestEU campaign. A minimum of three graphic themes are to be proposed to DG GROW and EASME; all copyrights and source data/files (high resolution for printing, as well as, low resolution versions for email signatures, etc.) have to be transferred to EASME at the moment of the proposal.

The contractor will indicate the need for obtaining agreement for the use of national symbols if the graphic theme contains them. It has to be designed in such a way that it can provide continuity and brand recognition with the European Enterprise Promotion Awards and the annual SME Assembly during every given year. The source files must be provided for brochure covers, social media banners, letter heads, etc. After the approval of EASME and DG GROW, the contractor will communicate the visual identity/graphic theme to others involved (Presidency, other institutions, national coordinators) and offer assistance in that aspect.

Key deliverable for this task	
✓	Timely delivery of at least three proposals for the graphic theme by mid-March of every year of the contract duration;
✓	Delivery of final ready-to-use graphic elements (brochure covers, banners for websites etc.) at the latest 10 working days after the final agreement from EASME and DG GROW.H1

**1.4.1.5. Feedback survey**

The contractor will provide an on-line feedback form in agreement with EASME and DG GROW.H1 and propose how this form shall be disseminated to participants; this task includes the compiling of the results of all filled-in questionnaires, provision of outlines of results within 10 working days of the event and the full analysis within a month. The contractor will also provide one version of the analysis which can be shared with the public (i.e. anonymised and ready for on-line publication). The feedback form has to test overall satisfaction as well as satisfaction regarding logistics, venue, the conference application, the EEPA ceremony as well as all other individual elements of the programme and its preparation. The survey has to be similar if not identical to that of previous years to allow for comparison.

Key performance indicators for this task	
✓	Timely provision of the draft online questionnaire minimum 1 month before the SME Assembly and provision to participants immediately at

the end of the event. The online survey will be considered satisfactory if – independent of the result as such – a minimum of 25% of registered participants have filled in the form.

#### 1.4.1.6. *Paperless*

The SME Assembly and EEPA award ceremony will be paperless events. Websites and on-site information have to allow participants to find their way around the event and find all relevant information about logistics and content, even without using the below described application. Documents such as the conference programme have to be printable; to the highest degree possible all these documents and other communication with participants shall contain a warning as to the need of printing (i.e. "think of the environment before printing this document").

#### 1.4.1.7. *Environmental impact and local sourcing*

The contractor is invited to make the offer based on ecological products and services such as recycled materials and to examine how to avoid waste and eventually offset CO2 impact. The contractor is furthermore invited to source services and products in the country and area where the SME Assembly and EEPA award ceremony will be held, insofar as this is technically feasible; the contractor will inform the Commission about sub-contractors for these services.

#### 1.4.1.8. *Application for smartphones and (tablet) computers*

The contractor will continue to develop the existing SME Assembly/EEPA/SME Week smartphone and tablet application, hereinafter "app" further<sup>16</sup>. Proposals to this end are to be integrated in the offer. Continuity of its availability and functionalities must be ensured. The functionalities must be similar to those already offered by the existing app.

DG GROW.H1 and EASME staff will have to be enabled to upload documents and data to the app. The development of this app to a fully-fledged SME policy application is encouraged, whether in parallel to the pure conference functionalities or combined with them.

The (updated) app has to be ready for roll-out to participants at the latest at the moment of the sending of formal invitation letters; it has to apply the graphic theme chosen for the given year and allow for a 'participants only' section for delegates to network with each other. The contractor has to be available for answering technical questions regarding the download of and registration with the app and maintain an offline helpdesk from one month prior to the SME Assembly till the end of the event for all questions related to its use. During the conference hostesses and contractor staff have to be ready to help delegates with the download and handling of the app. The app content needs to be updated in regular intervals but at least thrice during the time from the sending of the invitation to the SME Assembly/EEPA ceremony; the latest of these three updates has to be made available at least one month before the SME Assembly. Further updates need to be made available after each milestone of the event itself

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<sup>16</sup> Tenderers can consult the app produced for 2016: Go into your app store and search 'SME assembly 2016'. Select the icon and install as usual. When prompted, please use the following login details: Username: guest; Password: sme2016. The icon 'App Help' will assist with using the app if required.

(i.e. results award ceremony, main speeches, voting results), as well as, after the event (i.e. feedback form, photos and video, media impact).

Key performance indicators for this task	
✓	Timely roll-out of the (updated) app; uptake of the app by at least 85% of registered delegates till the beginning of the conference.
✓	Timely provision of the updates and the helpdesk functionality. Timely roll-out of the (updated) app; uptake of the app by at least 85% of registered delegates till the beginning of the conference.
✓	Timely provision of the updates and the helpdesk functionality.

#### 1.4.1.9. Tasks primarily specific to the SME Assembly

- Organisation of the annual SME Assemblies as a policy conference which is expected to last for 2 ½ days and to take place in the Council Presidency countries in the second half of each year, i.e. Austria, Finland and Germany. Participation will be between 500-600 persons representing business, government, European institutions, media and academia as well as for each year a representative from a maximum of two national winners from each country participating in the EEPA (this number excludes Commission, Presidency and contractor staff related to the organisation of the event). The venue for the conferences will be decided by the Presidency, DG GROW.H1, in cooperation with the contractor. The final number of participants will depend on the venue size and the agreement between the Presidency/cies and DG GROW.H1; the decision will be taken in close cooperation with the contractor and EASME. The contractor can base the assumptions for costings on 550 participants excluding its own and Commission/EASME staff.

Key performance indicators for this task	
✓	The SME Assembly will be considered a success if at least 88% percent of registered participants who provide answers to the feedback survey view it as "worth attending" or "definitively worth attending".

- Organisation of at least one scouting visit to the country of the Presidency to evaluate conference and award ceremony venues, meet with national stakeholders and policy makers and local sub-contractors and hotels. The contractor will organise these visits by providing an agenda and timetable sufficiently in advance and by taking care of logistics.
- Updating of the master guest list for the SME Assemblies in close cooperation with DG GROW.H1
- Management and follow-up of participants: Management of enrolments based on the online registration tool chosen in cooperation with the contractor. This includes creating the registration form(s) or providing all information and models necessary for the creation of these forms, managing the information in the registration database, extracting details to manage the follow-up process, publishing and dispatching confirmations, producing and dispatching lists of participants to other involved parties,

managing communications by letter, e-mail and telephone, dispatching all relevant information and regularly updating the list of participants both for the conference and for the ceremony. DG GROW.H1 or EASME will likely use the services of another contractor for travel and accommodation arrangements including registration of participants. Those services will not be part of the current contract; in case another contractor is used for these tasks, the contractor of the current contract has to maintain close contact and cooperation with that contractor to assist in any possible way so that participants can enjoy a smooth trip to, stay at and trip back from the event.

- On-site management and registration of participants during the conferences, provision of a registration desk for the duration of the conference including hotline for participants, and managing the distribution of participants' kits (if applicable).
- The contractor has to make the necessary provisions for at least six hostesses during the conference to help with logistics and organisation; the hostess function can be assured by regular personnel of the contractor or ad-hoc personnel. The exact number of hostesses will vary from event to event in view of the provisions of the respective Presidency. Hostesses need to be able to communicate in several languages, preferably including the Presidency language; they need to be properly briefed on the logistics and content of the event.
- Proposing and managing the speakers, collecting their CVs, photos and presentations and/or video clips, and installing the presentations at the conference venue; speakers for the SME Assemblies and the Award Ceremony need to be agreed with GROW.H1 and will be selected in relation to the proposed programme; to the degree possible speaker proposals shall be accompanied by video proof of earlier speaking engagements. The Contractor will contact the identified speakers and provide them with all relevant information at least four weeks in advance. The Contractor will take care of all logistical arrangements for their participation. The Contractor will ensure that the speakers provide all necessary presentations and materials in due time. The Contractor will be responsible for all the speakers' fees.
- Conference programme: The programme of the conference shall use to the degree possible participatory leadership / Art of Hosting techniques; to this end the contractor shall foresee the expertise necessary to organise the conference in a participatory way (a minimum of 2 hosts and 2 harvesters/recorders must be provided). In the same context (live) graphical recording of discussions and conclusions shall be foreseen as an option. A first outline of the programme for 2018 shall be delivered with the tender; this outline should cover major elements of SME policy with a specific accent on start- and scale-up support as well as development and linking of ecosystems. For subsequent years the draft needs to reach the Commission by mid-April of the year in which the conference is held.

Key deliverable for this task	
✓	Timely provision of draft programme for 2018 (and 2019 and 2020, if applicable).

- Design and layout of the conference programme in English and where applicable the Presidency language. The programme layout needs to follow the visual identity/graphic theme as described in point 1.4.2.4.

- Managing a welcome desk and green room at the conference venue for speakers and VIPs (i.e. national SME Envoys), including the necessary personnel.
- Master of Ceremony/Chair (MC) for the assembly: The contractor will propose to the Commission/EASME a short-list of at least two appropriate MCs and will then conclude the contractual arrangements with the selected person. The MC shall come from the Presidency country and have a proven record of hosting events of similar nature. The Contractor will take care of all logistical arrangements for the MC's participation. The Contractor will be responsible for all the MC's fees.
- Proposal of up to three media persons from each Member State and SME Week/EEPA participating countries outside the EU to attend the awards ceremony and conference; a first proposal is to be made at the time of sending the "save-the-date" email to potential participants. The list is to be updated the moment the shortlist of the EEPA candidates is known; in particular as regards journalists from non-EU Member States whose projects have been shortlisted for the EEPA. The Commission will decide on the media persons to be invited. Be aware that additional media persons might be brought to the event via European Commission contracts with press associations such as the European Journalism Centre (expenses are not part of this contract); recent SME Assemblies have been attended by approx. 50 media persons.

Key deliverable for this task
✓ Timely proposal of up to three journalists from at least two different types of media (i.e. print, TV, radio or online)

- Accompanying media participants and maintaining a media office for the whole duration of the conference via at least one dedicated member of the contractor team. The person has to be nominated at the moment the list of proposed media participants is transmitted to the Commission and for information to EASME. The person will invite media persons personally and make sure that media has access to speakers, EEPA candidates and VIPs (subject to the agreement of these persons) for interviews or news features. The person will proactively propose interview, photo/filming and 'story' opportunities to the media before, during and after the events. This will include provision of video and image content to media. The person will be constantly available for media persons throughout the event and develop and maintain a partnership with them that is governed by mutual trust and respect.
- Arranging of up to two press conferences/briefings during the time of the SME Assembly, including targeting and briefing journalists, supporting story development and drafting of pan-European press releases/memos or news room items as well as managing the logistics of the press conferences incl. interpretation facilities. This includes the translation of these documents into the Presidency language(s) and the language(s) of the country/countries concerned by the story.
- Organising and running a media centre (workstations for media) in the conference venue or close by; this includes the technical equipment of the room including a press corner for interviews; this task does not include the provision of WIFI services.
- Post-event issues, such as, thank-you-letters to speakers and other active participants other than contractor, Commission or Presidency personnel; information about photo

and video downloads to participants etc. A draft thank-you-letter has to reach EASME and the Commission within 5 days after the event and be dispatched to all concerned within 2 working days after having obtained the agreement of the Commission/EASME to the draft letter.

- Organisation of transfers for all conference participants to and from their points of arrival to the chosen hotel(s) and the conference venue and back at the beginning and end of the conference proceedings, as well as – where necessary – from the main hotel(s) to the venues of the EEPA ceremony or network dinner respectively; provisions shall be made for VIP transport for the main speakers of the conference and the award ceremony (the exact organisation and extent of VIP transport will depend on the Presidency country's arrangement for VIP treatment and is to be agreed between the Presidency, the Commission and the contractor). The Commission or EASME will contract out the actual provision of the transport services as such (unless the Presidency country would provide this); the contractor has to establish a relationship of close and efficient cooperation with the transport provider to guarantee a seamless transfer system.
- Production and provision of electronic name badges (with lanyards); the design of lanyard and badge has to be aligned with the graphic theme/visual identity of the event and has to be agreed with the Commission, where possible it shall include the Presidency logo. Badges and lanyards have to be personalised to allow the management of categories of participants by colour (delegate, VIP, organiser, speaker, press...); the contractor will have to provide all what is necessary to produce additional badges or replacements on site as necessary. The electronic badges have to allow the exchange of contact details between delegates (subject to their agreement to this exchange during the registration process) and give delegates the possibility to recuperate the contact information for networking purposes, if possible through the conference app.
- Provision of nameplates for all conference speakers, as well as nameplates for meetings of the SME Envoys and any other gathering that is organised during the event (i.e. press conference) including production of additional nameplates on site, by applying the graphic theme/visual identity to the degree possible.
- Provision of a PowerPoint presentation or similar covering the whole event (i.e. slides with the names of each session/workshop and relevant speakers), in accordance with the graphic theme/visual identity.
- The contractor shall make provisions for a production office in or close by the venue(s) according to its own needs and including working space for at least four Commission staff; this task will include the provision of WIFI services in case the production office is not located in the conference venue or is not covered by the WIFI service at the conference venue.
- The conference venue and all catering for the conference will be rented / paid for by the Commission or the Presidency. Nevertheless, the contractor might be required to assist the Commission and EASME in finding the necessary venues and caterers. The Contractor has to assist the Commission with defining the necessary room programme for the event and other needs that need to be catered for by the venue provided. The contractor will have to obtain the rooms plans from the venue provider and make them available to the Commission to allow detailed planning. The contractor will also assist the Commission in liaising with the conference venue provider and catering companies.

- The contractor will provide all equipment and personnel for the tasks described for the SME Assembly and EEPA award ceremony. A list of all the minimum technical requirements suggested by the contractor must be included in the proposal. The contractor is encouraged to use local suppliers and providers, where possible.
- If technically possible interpretation for the event will be provided by Commission services (SCIC). In case the chosen conference venue is not sufficiently technically equipped, the contractor will ensure that SCIC's requirements are met as for timescales, technical requirements (ISO compliant booths), and placing of booths and the compliance with SCIC technical specifications. Commission services and EASME will assist the contractor in finding companies that can provide the necessary services and in defining the exact needs. The contractor will provide all necessary equipment (booths, sound desk, headsets etc.) for interpretation facilities according to these technical specifications for all programme elements of the conference and the EEPA award ceremony. Room plans including the position of all equipment, booths and furniture (CAD) and equipment conformity declarations have to be provided to the Commission two months before the event. The contractor has to provide all necessary equipment (booths, sound desk, headsets etc.) for interpretation facilities according to the technical specifications of the Commission interpretation services (SCIC), for all programme elements of the conference and the EEPA award ceremony (specifications available on request). The language 'regime' of the conference will comprise 5 languages (EN, FR, DE, ES and IT, plus, where applicable, the Presidency language). FR, DE, ES and IT can be spoken but only interpreted into EN; this means that one, maximum two ISO compatible booths for the plenary meeting room and SME Envoy meeting room need to be foreseen; workshops will have a simplified regime of EN plus the Presidency language or EN alone subject to agreement with the Commission and the Presidency. Press conferences are likely to be held in EN, DE, FR plus, where applicable, the Presidency language. The venue of the EEPA award ceremony will require up to two 2 interpretation booths; the award ceremony will be held in EN and the Presidency language(s).

Key deliverable for this task	
✓	Timely provision of room plans (CAD) and equipment conformity declarations for the interpretation equipment

- Provision of banners, posters, roll-ups and all necessary signage for signposting during the entire event incl. the EEPA award ceremony. Signage can be done electronically via screens or similar and has to follow the graphic theme/visual identity.
- Photography of the event (please be aware that this point refers to all elements of the SME Assembly/EEPA award ceremony, i.e. for the whole duration of event): The contractor will provide at least one professional photographer for the duration of the whole event, i.e. the SME Assembly, the EEPA ceremony and any other event related to either. The contractor will be responsible for briefing the photographer prior to the event to ensure effective communication concerning the shots required. The contractor will provide all necessary equipment and staff for processing and selecting photographs, graphic modification of photographs for uploading photos to an image sharing website to enable download by the Commission and participants. Photographs showing all EEPA winners, group photos, VIPs and key speakers of the conference as well as photos showing the conference and EEPA ceremony as a whole must be made available for

uploading to the internet as soon as possible but no later than the morning following the ceremony, respectively the end of the conference; further photos have to be made available within 5 working days.

**Key deliverable for this task**

- ✓ Timely provision of high quality photography

- Video recording (please be aware that this point refers to all elements of the SME Assembly/EEPA award ceremony, i.e. for the whole duration of event) serving two purposes: a) use as source material for news agencies post event; this material shall contain at least the opening ceremony and political speeches, the conclusions as well as the EEPA awarding ceremony ; b) a viral summary video of the whole event has to be produced having in mind as an audience participants who would like to relive the main elements and non-participants who should get a good overview of what was the scope and content of the event. The raw footage needs to be available at the end of the event and be cut at that moment in time, based on a script agreed between Commission staff and the EASME contractor. To that end the contractor will have to provide an editing suite for videos and the necessary personnel. The recording of the entire conference proceedings including workshops is not foreseen; the extent to which different sessions need to be filmed will depend on the exact programme and has to be agreed between the contractor and the Commission beforehand on the basis of the draft programme. For the EEPA ceremony a standalone video of that part of the event has to be produced.

**Key deliverable for this task**

- ✓ Provision of high quality filming at the times indicated above

- During the event a minimum of 10 short interviews with participants about issues discussed during the assembly have to be produced; the interviews can be done in a way that an identical question is asked to all interviewees. The tenderers are invited to develop this concept further. These interviews have to be available for review before the end of the conference so that they can be included in the presentation of the conclusions of the Assembly.

**Photographs and filming: Important note**

It is the contractor's responsibility to make sure the necessary permission/agreements for taking pictures and filming have been obtained by the participants prior to the event.

Image rights disclosure forms have to be provided to and collected from the conference participants by the contractor in cooperation with the Commission, preferably via the registration process.

Image rights disclosure from EEPA shortlisted is to be obtained in connection with their confirmation of entry to the Awards scheme.

- The contractor will foresee the necessary equipment for live projection of the event inside the venue to allow participants outside the rooms to follow the proceedings.

- The contractor will provide two portable hard drives or similar devices to the Commission; these storage media will contain all video footage (raw and edited), all photos (raw and edited) and all other documents, presentations etc. produced before and during the conference. The storage media have to reach the Commission within 10 working days after the end of the event. The hard drives or similar devices used will remain with DG GROW.H1 and EASME staff.

**Key deliverable for this task**

- ✓ Timely delivery of complete storage devices.

- Dissemination of video and photographic material to EEPA winners and event participants in cooperation with the Commission.
- The contractor will foresee the translation of the necessary texts for website and conference programme from English into respective the EU Presidency language(s), French and German. Estimated length of text to be translated: 40 pages. Most of the translation will be requested for the creation of the website and the basic conference programme, but some updates/modifications will be necessary – particularly to the programme – until the event itself. Further translation of communication and promotion material (including for media use) into all EU languages is to be foreseen at the rate of approx. 2 pages per month.

**Key deliverable for this task**

- ✓ Timely delivery of high quality translations. The Commission will undertake a quality check with native speakers.

- The contractor will be responsible for organising the transport of all involved staff (contractors' staff and other) for the whole duration of the event and the time necessary for set-up and breakdown as well as the scouting missions to the event venues.
- The contractor will make the necessary provision for receiving and sending as well as storing of material or equipment such as roll-ups, mobile stands, brochures or any other material and equipment necessary from wherever it is to the venue and back. The Commission will cater for the sending and returning (not the storage) of its equipment but the contractor will be responsible for making the equipment ready for pick-up by the forwarder chosen by the Commission after the event.
- If applicable the contractor will assist in the distribution of Presidency gifts to participants.

**1.4.1.10. Tasks primarily specific to the EEPA**

- Organisation of and support to the European jury through maximum two meetings per year. Organisation of and support to the group of national EEPA coordinators (Single Points of Contact) that have been nominated by their country to manage the national selection process; the group meets twice a year and all meetings mentioned in this context are organised in Brussels at European Commission premises with no logistical

costs for the contractor. The contractor will be responsible to cover the costs for travel and accommodation of four jury members for the attendance of each of the jury meetings.

- Receipt, registration and acknowledgement of receipt of the entries for the awards (electronic copy only). As entries can be made in all EU official languages translation into English may be necessary. In the past, approximately half the countries sent their entries in their language. To ensure consistency, the contractor will verify and complete if necessary the one-page synopses from the application of each nominee that will be submitted to the jury members along with the files containing all entry forms in electronic form.
- The contractor will answer all requests made by national EEPA coordinators within 48h; to that end the contractor will nominate a team member or members, dealing with the national coordinators and forming the EEPA secretariat.
- Updating and translation of documentation as necessary: operational manual for national contact points, entry form, promotional factsheet (one page A4 size) and Power-Point presentation (if required) in English. Translation of the documentation into all EU languages (except Gaelic and Maltese) and electronic distribution to national EEPA coordinators for use in national competitions.
- Production of a short video clip/slide show (no more than 90 seconds) consisting of animation, photos/video and text to introduce categories, finalists and winners; material provided by shortlisted/winners shall be included wherever possible. The contractor has to provide the audio-visual material no later than 48 hours before the beginning of the conference and award ceremony.
- Production of short video clip/slide show (no more than 180 seconds) consisting of animation, photos/video and text to introduce all shortlisted projects per category.
- The contractor will create a yearly compendium with each year's winners and runners-up of EEPA showcasing their projects (models of previous years available on EEPA site) and translation the compendium into all EU official languages (except Maltese and Gaelic). The compendium will be produced in pdf, both as a low quality version for downloading, online reading and occasional local printing and a high quality version for professional printing. The contractor will ensure the dissemination of this compendium in relation to relevant events organised at European and national level and will develop further opportunities for nominees and the winning entrants to share best practice. The contractor will also ensure the dissemination of the compendium to the national EEPA coordinators, winners and runners-up as well as SME Assembly participants (including journalists). Together with a compendium the contractor will prepare 1) a web content featuring the EEPA Grand Jury Prize, winners and special mentions ready to upload on the DG GROW EEPA website and social media immediately after the award; 2) a web banner for each of the winners (including the EEPA Grand Jury Prize and special mentions) to promote the EEPA competition on their websites/social media or relevant stakeholders websites. The contractor will also send these banners to all winners/special mentions and relevant EEPA co-ordinators. The Contractor will promote/disseminate EEPA winning projects also through social media stories.
- The existing EEPA kite marks will be updated for every year and distributed to winners.

- The application and synopsis of EEPA entries, which have been selected by the jury as good practices have to be translated into French and German, to be used for the existing online good practice database.
- Organisation of the EEPA award ceremony at the conference venue or close by. The award ceremony shall distinguish itself from the SME Assembly, visually and organisationally, in order to create a festive atmosphere to celebrate the best practices in enterprise promotion to be awarded. The venue for the European Enterprise Promotion Awards ceremony (in the same town or very nearby to the SME Assembly) will be selected by DG GROW.H1, based on a proposal by the contractor and in cooperation with the Presidency; cost for this venue will be covered by the contractor. The attention of the tenderers is drawn to the fact that they may be required to provide other conference services, such as networking activities or facilitation.
- The contractor will be responsible for proposing the venue for the EEPA ceremony, in collaboration with the Commission and the Presidency country and will cover the expenses for the rental of the venue and the catering of the gala dinner; if the EEPA Award Ceremony will be integrated in the conference the contractor will organise and pay for a networking dinner at a location chosen in the above described way.
- Trophy and certificates: Commissioning of creative trophies for the winners at each ceremony (6 category trophies and one for the grand jury prize), preferably using artists from the countries hosting the ceremonies. The Contractor might be assisted in the selection of the artist by the Presidency and the Commission or stakeholder organisations; a model or plan is to be submitted to DG GROW.H1 for approval. The trophies have to be recognisable, linked to the visual identity/graphic theme to the degree possible, easily transportable and sufficiently big to be seen on screen/photo if the winners are filmed or photographed.
- Production of certificates on paper for all nominees to the EEPA to be presented during the event, applying the graphic theme/visual identity.
- Master of Ceremony (MC) for the Award Ceremony: The contractor will propose to the Commission a short-list of at least two appropriate MCs and will then conclude the contractual arrangements with the selected person. The MC shall come from the Presidency country and have a proven record of hosting events of similar nature. The contractor shall fully cover the MC's fees.
- The contractor will develop opportunities for EEPA nominees and winners to share best practices and get visibility. A network of four promoters (Eurochambres, Eurada, Eurocities, UEAPME) and the Committee of the Regions has been created to promote the Awards and the winners. This network needs to be maintained and can be further expanded in agreement with DG GROW.H1. An 'alumni' network of EEPA national winners/finalists and winners through EEPA pages on social networks shall be created and animated throughout the year to spread good practices. Synergies with other programmes (i.e. Erasmus for Young Entrepreneurs shall be sought).
- The contractor will assist national coordinators to carry out the national EEPA selection process (method at their discretion), promote the Awards and disseminate the compendium of winning practices.

*1.4.1.11. Tasks primarily specific to the SME Week*

- The contractor will develop a concept of how to improve public knowledge about and impact of the SME Week. This concept has to fit into the overall outreach and engagement strategy; it does however have to take specific care of the SME Week as being a decentralised series of events. The concept shall in particular develop the idea of stronger involvement of national stakeholders and links with other European and global initiatives such as TED or the Global Entrepreneurship Week.
- Production and dissemination of a monthly electronic newsletter with relevant themes on SBA implementation and SME Week events, including updates on the EEPA and SME Assembly; this newsletter will disseminated to national EEPA and SME Week coordinators and other stakeholders and interested parties.
- The contractor will be responsible for maintaining a close cooperation with the national SME Week coordinators and can count on their support for the dissemination of information.
- The contractor shall reply within 48h to all questions sent from national SME Week coordinators directly or from DG GROW.H1 and EASME; to that end the contractor will nominate a specific person in the team to take care of the contact with the coordinators. This person will also provide assistance to the national coordinators and SME Week event organisers with their queries for information.
- The contractor will put together a set of tools for national coordinators and SME Week event organisers; use of these tools will allow events to be recognised as "SME Week" events to be entered into the existing on-line registration tool and to brand their events under the SME Week umbrella. These tools shall be made available in the official EU languages (except Gaelic and Maltese). It shall at least contain the logo, the graphic charter for the use of the SME Week logo, a web button, a web banner and other information for event organisers. The contractor shall keep this information updated throughout the duration of the project and is invited to present a concept for the development of the SME Week as a concept.
- SME Week events in participating countries need to be monitored and evaluated; evaluation shall include feedback from National Coordinators, event organisers and a quantitative analysis of the results wherever possible. Evaluation shall provide information on at least the following criteria: Number of events held; number of people attending each event; quality of the events (feedback from attendees); subjects discussed; media coverage.
- The contractor will organise, in close cooperation with the Presidency, the Commission and local stakeholders where applicable, an exposition of entrepreneurs and entrepreneur support providers (such as incubators, public financing bodies or stakeholder organisations) at the venue of the SME Assembly. This exposition will be part of the European SME Week.
- The contractor will also organise, together with the Commission and the Presidency, as well as, stakeholder organisations where applicable, a networking event on the evening before the SME Assembly. For this reception the contractor will provide the necessary technical and logistical support before and during the event; the venue will be selected by the Presidency and the Commission in cooperation with the contractor. Costs related to venue hire and catering will not be the responsibility of the contractor.

#### 1.4.2. Geographical scope of the tasks

The services to be delivered will cover all EU Member States, as well as those non-EU countries participating in the COSME programme<sup>17</sup>.

#### 1.5. INPUT BY THE CONTRACTING AUTHORITY

EASME will provide all necessary access codes to social media and web sites at the beginning of the contract. The contractor shall return them to the Commission and EASME at the end of the contract, or during the course of contract, if needed.

#### 1.6. GENERAL GUIDANCE ON METHODOLOGY

##### *Work packages*

The scope of the work that the contractor must undertake encompasses the following tasks, grouped under the following work packages:

Tasks (point 1.4.1 specifications)	Work Package (WP)
1.4.1.1, 1.4.1.2, 1.4.1.3, 1.4.1.4, 1.4.1.5, 1.4.1.6, 1.4.1.7, 1.4.1.8, 1.4.1.9	WP1
1.4.1.10	WP 2
1.4.1.11	WP 3
1.4.1.12	WP 4

The tenderers are expected to submit a roadmap and a detailed management plan for all the tasks falling under these four work packages.

##### *Work resources and staff*

The contractor must provide the necessary manpower and support for the management and administration of the project. In particular, the contractor must assign:

- a task manager for each work package to be in charge of and responsible for the implementation and execution of the contract in line with its terms and conditions, and respecting the contractual deadlines;
- one person who will ensure the overall co-ordination
- at least one staff member fluent in the language(s) of the Presidency country/ies during the duration of the contract (incl. the possible. contract renewals).

Any change in personnel shall be notified promptly. There must be back-up persons with equivalent qualifications, fully aware of the project, to cover periods when the manager(s) or other team members are absent (i.e. holidays, sickness).

<sup>17</sup> <http://ec.europa.eu/DocsRoom/documents/23201>

**1.7. PERFORMANCE AND QUALITY REQUIREMENTS**

*Performance*

Performance will be measured according to the following:

- Number of meetings/events organised
- Number of participants taking part in meetings/events organised
- Timely dissemination of the results
- Progress achieved in the implementation of the measures in the 10 key areas of the SBA
- Timely production of tools (web-based, audio-visual and/or printed leaflets, social media campaigns)
- Effective dissemination of tools and use in major events
- Impact on target public (number of impacts, number of visits for websites, number of videos viewed online)

Targets will be refined at the kick-off meeting with EASME and the European Commission.

Tasks	Key performance indicator
WP1 – Task 1.4.1.2	Twitter / Facebook followers Views Youtube Number of media mentions
WP1 – Task 1.4.1.5	% respondents to survey
WP 1 – Task 1.4.1.8	App uptake - % delegates
WP 2 – Task 1.4.1.10	% delegates satisfaction level
All WP	Timely delivery of all tasks deliverables

*Quality*

Quality assurance will remain the responsibility of the contractor. The contractor will guarantee full quality control of all the provided services, in line with the requirements set out in these tender specifications.

The tenderers must include in their bids a quality plan. In the proposed quality plan, the tenderers must specify how they intend to control and ensure high quality and effective monitoring of the services and works to be supplied in execution of the contract. The tenderers must specify, among other things:

- The various procedures they intend to implement and the indicators they intend to use to ensure the quality and monitoring of the services performed;
- Personnel policy, management and training;
- The procedures they intend to use to gather and process indicators of performance and client satisfaction and any complaints received;
- Quality control and assurance / management of complaints;

- The procedure for updating and adapting the quality plan, taking account of the fact that any such updating and adaptation must have the Commission's and EASME's prior approval.

All expenses incurred in producing and implementing the quality plan will be borne in full by the contractor.

The Contracting Authority, EASME, reserves the right to conduct quality audits on the implementation of the contract on the Contractor's premises. EASME may call upon third parties for assistance in conducting these audits.

The contractor undertakes to give EASME full support during these audits. In particular, the contractor undertakes to authorise access to all the information on the contract within a maximum of two weeks after receiving a request from EASME, and to answer all questions concerning the contract put to him by EASME, the Commission or by a third party authorised to carry out the audits by EASME or the Commission.

#### **1.8. STARTING DATE OF THE CONTRACT AND DURATION**

It is expected that the contract is signed by the end of 2017.

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 14 months, counting from the 1<sup>st</sup> day of the month following the entry into force. The execution of the tasks shall not start before the contract has been signed. Work will follow the timetable detailed below (see 1.10. Planning, output and deliverables).

The contract may be renewed two times, for 14 months each, to cover the same tasks in 2019 and 2020, depending on the future needs<sup>18</sup> and on the budget availability. In particular, any renewal will be conditional on the COSME Work Programmes 2018 and 2019, and provided the contractor's performance is satisfactory.

#### **1.9. VOLUME OF THE MARKET**

The maximum amount for the execution of all the tasks referred to in this call for tenders is EUR 1.1 million, including all charges and expenses and excluding any renewals. No contract offer above this amount will be considered.

The maximum amount for the possible renewal is EUR 1.1 million per renewal, or EUR 2.2 million for the two renewals, including all charges and expenses. No price quotation above this amount will be considered. The price quotation for the possible renewals should strictly follow the rules as described under Section 3.7, Part E "Financial offer" of these tender specifications.

#### **1.10. PLANNING, OUTPUTS AND DELIVERABLES**

The contractor must provide the required deliverables, reports and documents in accordance with the conditions of the draft service contract.

Key tasks' technical deliverables include:

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<sup>18</sup> Art. 114.a of the Regulation (EU, EURATOM) No 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the Union and repealing Council Regulation (EC, Euratom) No 1605/2002, as amended.

Tasks	Key deliverables
WP1 – Task 1.4.1.4	Timely delivery of graphic theme proposal Ready-to-use graphic elements
WP1 – Task 1.4.1.5	Draft online questionnaire
WP1 – Task 1.4.1.8	App roll-out Provision of updates and helpdesk
WP1 – Task 1.4.1.10	Provision draft conference programme Proposal journalists Provision of room plans Interpretation equipment conformity High quality photography High quality filming Storage devices Quality translations

The contractor must submit to EASME and DG GROW.H1 an annual project work plan and a communication strategy with its work plan. This document shall include an executive summary, and introduction, a PR strategy with audience segmentation and messaging, brand and visual identity proposals, web online strategy and internal communications plan. EASME and DG GROW.H1 will comment on the document/s submitted within the period indicated in the planning table below. The document/s will be submitted in 2 copies in paper version and in electronic format compatible with Word in English.

Other technical deliverables include as well:

- Updates of award documentation and website in English
- Promotional materials (fact-sheets, articles, press releases and regular newsletters, digital content materials in web and broadcast formats);
- Database of contacts (master guest list);
- Nomination files for jury meetings including one-page synopses of all national nominations (maximum 60);
- Compendium of winning best practices translated and printed in English, prepared for each ceremony in time for distribution at the award ceremony; the languages and exact number of copies to be printed are subject to an agreement between the Commission and the contractor. As an indication, translations are needed in the Presidency language(s) if so requested as well as in the languages of the category and Grand Jury winners of each round of the EEPA.

To ensure the proper management and follow-up of the project, the contractor will be also asked to submit electronically to EASME and DG GROW.H1:

- Minutes of meetings and conference calls, and regular status reports;
- Short summaries focusing on the status and the timely execution of the tasks listed in the work plan and the communication strategy;
- Issues, in writing, affecting progress and corresponding corrective actions proposed;

- Monthly updates on the promotional activity regarding EEPA and SBA implementation in all Member States;

Presentations to be made at the various meetings to present the results of the action will be an integral part of the deliverables of the service contract. The details of the presentations, as well as, the related timetables will be agreed upon between the contractor and the European Commission and EASME on an *ad-hoc* basis when preparing these meetings.

Within the last month of the service contract, the contractor must provide all deliverables in an electronic handover file on a USB stick or external hard-disk or equivalent, and by email, to ensure a smooth transfer of the activities to another possible contractor. This handover file must include, at least:

- All reports
- Texts and translations
- Sources of information for the content
- Statistics and figures of main indicators related to performance, quality and volume of information managed
- Other documentation and materials produced.
- List of all intellectual property created and acquired for the purpose of the project, including declarations of the contractor/creator/intermediaries
- List of all pre-existing material used in the implementation of the contract and a declaration for all pre-existing intellectual property rights.

At the request of DG GROW.H1 and EASME a handover meeting might be organised.

#### **1.10.1. *Intermediate outputs and deliverables***

An interim progress report, together with an invoice for interim payment, shall be submitted, nine months after the contract's entry into force. If the contract is renewed for the two subsequent years, the same timing will be applied. The report shall include:

- description of all milestones, issues and deliverables
- the progress made *vis-à-vis* the annual project work plan
- the planning until the SME Assembly

The interim progress report must be submitted in English, in 2 copies, both in paper version and in electronic format compatible with Word. The detailed structure, size and sections of the report will be agreed with EASME and the European Commission in the regular coordination meetings. The contractor shall also submit a digital library of all digital materials on an external hard-drive.

EASME will comment on the document submitted within 30 calendar days.

#### **1.10.2. *Final outputs and deliverables***

A draft final report shall be submitted by email within 15 days of the SME Assembly. The draft final report shall include a complete description of all tasks undertaken and all deliverables of all the elements specified in the sections above, with particular attention to the following:

- description of all milestones, issues and deliverables

- highlights and results of media analysis as described in this tender
- detailed update on the preparations of the next SME Assembly conference, if applicable.

EASME will comment on the draft document submitted within 30 calendar days.

Within the period indicated in the planning table below, the contractor will submit, together with an invoice, the final report in its definitive form, taking full account of the observations made by the Contracting Authority on the draft final report, either by following them precisely or by explaining clearly why they have not done so.

The final report will be submitted in English in 2 copies in paper version and in electronic format compatible with Word. The detailed structure, size and sections of the report will be agreed with EASME and the European Commission in the regular coordination meetings. The contractor shall also submit a digital library of all digital materials on external hard-drive, together with the handover to another possible contractor.

EASME will comment on the document submitted within 30 calendar days.

<b>Timetable (months/weeks/days)</b>	<b>Meetings</b>	<b>Action or deliverable</b>
T0 = 1st day of the month following the entry into force of the contract		Start date of the action
T0 + 15 working days	Kick-off meeting	Minutes Submission of an invoice for pre-financing payment.
Following T0, bi-weekly	Coordination meetings (or conference calls) between EASME, European Commission and contractor	Minutes
Within 10 working days after kick-off		Annual project work plan and communication strategy
Delivery date annual project work plan and communication strategy + 30 calendar days		EASME acceptance
T0 + 9 months		Interim progress report and submission of invoice for interim payment
Within the 2 months before end		Final report

of the contract		Submission of invoice for final payment
Within one month before the end of the contract	At the request of DG GROW.H1 and EASME a handover meeting might be organised	

### **1.11. INTELLECTUAL PROPERTY RIGHTS**

The European Union acquires ownership of the *results* produced under the contract, including web, blog and social media content documents; success stories and portraits; statistics, partnerships with online services, promotion tools, infographics, visuals and audio-visual material. These *results* may be used by the Union and by EASME for the modes of exploitation specified in Article I.10.1 of the draft service contract (Annex 1 to these tender specifications).

The intellectual property rights related to the services to be provided are further detailed in clauses **I.10, I.14, I.15 and II.13** of the draft service contract.

#### ***Parts of results pre-existing the contract***

If the results are not fully created for the purpose of the contract this should be clearly pointed out in the tender. Information should be provided about the scope of pre-existing materials, their source and when and how the rights to these materials have been or will be acquired.

#### ***Plagiarism in the tender***

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

### **1.12. DATA PROTECTION**

In the implementation of the contract, the contractor must respect the requirements of Regulation (EC) 45/2001<sup>19</sup> on the data protection and adopt appropriate technical and organisational security measures in line with Article II.9 of the draft service contract (Annex 1 to these tender specifications).

## **2. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES**

The contractor must deliver the deliverables as indicated here below.

### CONTENT

#### **2.1.1. Publishable communication materials**

All publishable communication materials must include the following disclaimer:

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<sup>19</sup> Regulation (EC) 45/2001 of the European Parliament and of the Council of 18 December 2000 on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data

*“The information and views set out in this publication are those of the author(s) and do not necessarily reflect the official opinion of EASME or of the Commission. Neither EASME, nor the Commission can guarantee the accuracy of the data included. Neither EASME, nor the Commission or any person acting on their behalf may be held responsible for the use which may be made of the information contained therein.”*

### **2.1.2. 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. EASME 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](http://ec.europa.eu/ipg/standards/accessibility/index_en.htm)

For the publishable versions of communication materials, 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](http://ec.europa.eu/dgs/communication/services/visual_identity/index_en.htm)

<https://myintracomm.ec.europa.eu/corp/comm/VisualIdentity/Pages/Rules.aspx>

### **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 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/EU<sup>20</sup>.

#### **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 liabilities 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/tenderer only and where the contractor or tenderer, in order to carry out that contract, enters into legal commitments with other entities for performing parts of the contract. The contracting authority has no direct legal commitment with the subcontractor(s). In practice, any third party involved in the contract implementation which

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<sup>20</sup> 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).

has no legal link with the contracting authority but with the contractor will be considered as subcontractor (i.e. 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 indicate clearly in their methodology which parts of the work will be sub-contracted, and to identify all subcontractors whose share of the contract is above 20% or whose capacity is necessary to fulfil the selection criteria.

### **3.6. COSTS**

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

### **3.7. CONTENT OF THE TENDER**

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

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

For the appraisal, the written submission shall include a clear and detailed description of the organisation, technical and human 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, 1.4, 1.6 and 1.7 above.

- 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 renewals in 2019 and 2020 (see above section 1.8). 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).*

### **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 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](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](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<sup>21</sup>. 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

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<sup>21</sup> OJ L 124/36, 20.5.2003

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 minimum 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 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.

#### **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 (Annex 3), the information included in the tables in Annex 2.1 and Annex 2.2, fully completed, and the evidence, where requested.** 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 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<sup>22</sup> shall amount to at least EUR 500,000; this criterion applies to the tenderer as a whole, i.e. the combined capacity of all members of a group in case of a joint tender.

To this effect **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. The Contracting Authority reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

#### 4.3.4. Technical and professional capacity criteria and evidence

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

**The evidence mentioned below must be provided only on request, except for evidences B1, B2, B3 and B4 (CVs) that should be a part of the submitted offer.**

##### A. Criteria relating to tenderers:

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

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

Criteria	Evidence
✓ <i>Criterion A1: The tenderer must prove experience in</i>	✓ Evidence A1: the tenderer must provide

<sup>22</sup> 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.

<p><i>the field of pan-European communication and media campaigns, as well as in information and communication technologies and event organisation.</i></p>	<p>references for at least two projects delivered in these fields in the last two years with a minimum value for each project of EUR 200,000.</p> <p>✓ Certificates of satisfactory execution.</p>
<p>✓ <i>Criterion A2: The tenderer must prove access to key stakeholders (industry, SMEs and media) in Europe to provide a thorough coverage of the issues described in the specifications.</i></p>	<p>✓ Evidence A2: the tenderer must provide references for at least two projects delivered in the last two years showing compliance with the criterion.</p>

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

**B. Criteria relating to the team delivering the service:**

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

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

Criteria	Evidence
<p>✓ <i>B1 – Team leader: At least 7 years’ professional experience in event organisation or outreach activities at EU level, including overseeing project delivery, quality control of delivered service and client orientation. Experience in management of teams of at least 5 people.</i></p>	<p>✓ Evidence B1 – CV</p>
<p>✓ <i>B2 – Senior team members: At least 2 years’ professional experience in event organisation or outreach activities at EU level.</i></p>	<p>✓ Evidence B2 - CV</p>
<p>✓ <i>B3 - Language quality check: all members of the team responsible for drafting communication materials and/or in contact with EASME/European Commission staff should have at least English C1 level in the Common European Framework for Reference for Languages. One team member must have experience in drafting journalistic and/or public relations text and material.</i></p> <p>✓ <i>B4 - At least one team member should have the ability to communicate in the language of the Presidency countries to C1 level in the Common European Framework for Reference for Languages for the relevant periods of the contract (incl. the possible contract renewals).</i></p>	<p>✓ Evidence B3 - A language certificate or past relevant experience</p>

**4.4. AWARD CRITERIA**

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

Tenders that receive less than 65% of the maximum possible mark for the whole quality evaluation or do not obtain at least 60% of the maximum score for each of the award 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.

Criteria	Maximum Points
✓ <i>Creativity, coherence and relevance of the <b>proposal</b></i> <i>Overall ingenuity, clarity, consistency and suitability of the proposal to address the required tasks</i>	30 points
✓ <i>Quality of the proposed <b>methodology</b></i> <i>Effectiveness, relevance and consistency of the methodology, including the approach to coordination</i>	30 points
✓ <i>Organisation of the <b>work and resources</b></i> <i>Efficiency and effectiveness of the detailed work programme (description of all tasks, timetable, efforts and human and technical resources allocated, project management)</i>	30 points
✓ <i><b>Quality control measures</b></i> Effectiveness of the quality plan	10 points

**4.5. RANKING OF TENDERS**

The contract will be awarded to the most economically advantageous tender, i.e. the tender offering the best price-quality ratio determined in accordance with the formula below. A weight of 80/20 is given to quality and price.

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 and total price of the contract (initial duration)" in Annex 7 Price and breakdown of costs.

score for tender X	=	$\frac{\text{cheapest price}}{\text{price of tender X}}$	*	100	*	20% (price)	+	total quality score (out of 100) for all award criteria of tender X	*	80% (quality)
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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.

<b>5. ANNEXES</b>
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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: Financial offer (price and breakdown of costs)

Annex 8: Checklist for Submission