



EUROPEAN COMMISSION

Directorate-General for Education, Youth, Sport and Culture

Directorate: Culture and Creativity

Unit : Creative Europe Programme

CALL FOR TENDERS

N° EAC/18/2018

Mobility scheme for artists and/or culture professionals¹

PILOT SCHEME

TENDER SPECIFICATIONS

¹ Additional appropriations for a new action under the CULTURE sub-programme (15.04.02) – Amending Commission Implementing Decision C(2017) 6002 final on the adoption of the 2018 annual work programme for the implementation of the "Creative Europe Programme

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1. INFORMATION ON TENDERING

1.1. 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.

For British candidates or tenderers:

Please be aware that after the UK's withdrawal from the EU, the rules of access to EU procurement procedures of economic operators established in third countries will apply to candidates or tenderers from the UK depending on the outcome of the negotiations. In case such access is not provided by legal provisions in force candidates or tenderers from the UK could be rejected from the procurement procedure.

It is also open to all 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. Where the plurilateral Agreement on Government Procurement² concluded within the World Trade Organisation applies, the participation to this procedure is also open to all natural and legal persons established in the countries that have ratified this Agreement, on the conditions it lays down.

1.2. 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.

1.3. 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/EU³.

1.4. Joint tenders

For this procurement procedure, joint tenders are given a priority (See section 4.1 Award criteria. 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.

² See http://www.wto.org/english/tratop_E/gproc_e/gp_gpa_e.htm

³ 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).

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

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

1.5. Subcontracting

Subcontracting is permitted but the contractor will retain full liability towards the Contracting Authority for performance of the contract as a whole.

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

During contract performance, the change of any subcontractor identified in the tender or additional subcontracting will be subject to prior written approval of the Contracting Authority.

1.6. Structure and content of the tender

The tenders must be presented as follows:

Part A: Identification of the tenderer (see section 1.7)

Part B: Technical offer

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

Part C: Financial offer

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.

Breakdown

- The amount allocated to **Task I – Analysis** (see section 2.4.1) shall not exceed 10% of the total price.

- The amount allocated to **Task II – Experimentation** (see section 2.4.2) shall not exceed 85% of the total price distributed as follows:
 - Administration: 25% (including the creation and the administration of the mobility platform or portal)
 - Mobility costs (vouchers): 75%

- The amount allocated to **Task III – Policy recommendations** (see section 2.4.3) shall not exceed 5% of the total price.

Part D: Non-exclusion (see section 4.3)

Part E: Selection (see section 4.4)

1.7. Identification of the tenderer

The tender must include the annex 1 signed by an authorised representative presenting the name of the tenderer (including all entities in case of joint tender) and identified subcontractors if applicable, and the name of the single contact point (leader) in relation to this procedure.

In case of joint tender, the annex 1 must be signed either by an authorised representative for each member, or by the leader authorised by the other members with powers of attorney. 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 signed by an authorised representative stating their willingness to provide the services presented in the tender and in line with the present tender specifications.

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

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

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

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

2. TECHNICAL SPECIFICATIONS

2.1. General background

Cross-border mobility of people and workers, as well as the free flow of ideas, are central to the European project. Recent studies and literature demonstrate the importance and the impact of mobility for the professional development of artists and cultural professionals: to get inspiration (both on artistic level but also for one's organisation's business model), to boost creativity, to promote ideas and works' circulation, to develop and reach out to new markets, to get visibility/recognition, or to increase job opportunities.

Artistic and cultural mobility has received increasing policy attention at EU and national levels. Mobility has always been a policy priority under the European Agenda for Culture⁴ and its respective work plans and a crucial component of the Creative Europe programme⁵. *The new Work plan for Culture (2019-2021)*⁶ considers mobility as a key factor in improving social cohesion and well-being in Europe's societies and a strong contributor to international cultural relations. Recently, Culture ministers from several Member States have explicitly called upon the European Commission to investigate the possibility of setting up a specific mobility action⁷.

Opportunities for cross-border mobility of artists and cultural professionals do already exist with the support of public institutions, private foundations and/or NGOs, at local, regional, national, European and international level; EU programmes and funding instruments offer a large range of opportunities for cross-border mobility activities in the cultural and creative sectors. Creative Europe does it, especially under cooperation projects and platforms strands. Erasmus+ primarily supports transnational mobility actions with a strong learning component as a key element. Erasmus for Young Entrepreneurs supports the mobility of young creative entrepreneurs and the European Solidarity Corps also offers individual mobility opportunities for employees, trainees, apprentices or volunteers to be engaged in solidarity-related activities in a wide range of sectors, including culture.

However, evidence from the sector shows important shortcomings in this existing support to mobility such as lack of result-oriented opportunities going beyond providing a transnational learning experience (for instance to focus on the potential of co-creation or audience development), segmentation between older and more established artists and younger and less

⁴ *Resolution of the Council of 16 November 2007 on a European Agenda for Culture (2007/C 287/01)*

⁵ *Regulation (EU) No 1295/2013 of the European Parliament and of the Council of 11 December 2013 establishing the Creative Europe Programme (2014 to 2020) and repealing Decisions No 1718/2006/EC, No 1855/2006/EC and No 1041/2009/EC*

⁶ *Foreseen for adoption in May 2018*

⁷ <http://data.consilium.europa.eu/doc/document/ST-9262-2017-INIT/en/pdf>
<http://www.culturecommunication.gouv.fr/Thematiques/Europe-et-international/Europe-de-la-Culture-reunion-de-ministres-de-la-Culture-europeens>

established ones, restrictions based on nationality and educational qualifications, geographical unbalances, lack of reliable information, and only limited direct support for individuals.

Beyond the negative impact on the individual artists' and cultural professionals' careers, fragmented access and obstacles to cross-border mobility are hampering the potential of the sector to contribute to the EU's social, economic and integration ambitions, and to the building of a strong internal market and of a European society rooted in shared values and common cultural heritage.

Investing in a dedicated and flexible mobility scheme at EU level targeting artists' and culture professionals' capacity to co-create across borders could help address the shortcomings in existing mobility support schemes and unleash the potential of the sector to contribute to EU's ambitions and values.

2.2. General objective

The main objective of the tender will be to prepare the ground for a mobility scheme in creative and cultural sectors, from 2021 onwards in the next generation of EU programmes.

2.3. Specific objective

1. To explore and analyse the conditions for setting up a successful and sustainable scheme allowing individuals to engage in a cross border mobility project.
2. Propose and test a funding scheme for individual mobility of artists and/or culture professionals.
3. Provide conclusions and recommendations

2.4. Tasks

According to the specific objectives, the purpose of the action undertaken in the framework of this pilot scheme is threefold: analyse, experiment, and recommend.

2.4.1. Task I – Analysis

Feasibility study

The tenderer will assess the state-of-the art of artists and culture professionals' mobility at European level and the terms and conditions for an effective funding scheme. The analysis will imperatively take into account what has already been done in this field, notably in the framework of the Open Method of Coordination (MOC) of the European Agenda for Culture and the related working groups on "Mobility".

More specifically, it is expected that the above task will result in a report, which will include at least:

- An analysis of artists and culture professionals' individual mobility: In particular the peculiarities of such mobility in the creative and cultural sectors, the benefits and the obstacles.

- An updated mapping of existing funding opportunities for mobility in the creative and cultural sectors at local, regional, national and European levels; in particular, the identification of best practices and the risks of overlapping with existing schemes;
- Identification and analysis of synergy and complementarity with EU actions and support in the field of mobility, notably with the current Erasmus+ programme; in particular, the tenderer will appreciate the added value of a specific funding scheme for artists and culture professionals at EU level;

This task shall answer the following challenges and needs:

- Boosting creativity, exploring markets and developing careers;
- Matching offer and demand
- Facilitating individual mobility and circulation of works, simplifying administrative formalities

Outputs

The outputs of this task should allow defining the most effective operational framework to implement, in a first stage, a pilot scheme and, in the short/mid-term, an EU mobility scheme in the creative and cultural field. It should include a sector-relevant definition of "mobility" and, should the conclusions of the analysis demonstrate the need to do so, an assessment of the necessity to focus on a specific group of beneficiaries or a specific sector.

2.4.2. Task II - Experimentation

Following acceptance by the Commission of the outputs submitted under task I, the tenderer will develop and test a mobility scheme for artists and/or culture professionals

More specifically, it is expected that the above task will result in:

- A. The implementation and the administration of short-term mobility actions, including namely a methodology for the selection of participants**
- B. The creation of a mobility portal or a platform**
- C. The design and implementation of a communication and information strategy and a methodology for the dissemination and valorisation of results**

A. Pilot implementation and administration of mobility actions

Mobility is about results – not just travelling across borders and meeting people. In this regard, the mobility actions implemented under this pilot scheme should imperatively go beyond the traditional residencies and talent exchange's programmes and aim at increasing and improving job opportunities, professional development and access to new markets, collaboration and innovation.

At operational level, the mobility actions implemented during the pilot phase should have **at least** the following distinctive features:

- Be part of a creative and cultural project (with a preference for innovative projects touching upon various disciplines and sectors);

- Cover individual, flexible and short-term opportunities with a balanced geographical coverage;
- Be organised in a clear and transparent process with diversified, strong and relevant partnerships;
- Be open to artists and/or culture professionals who are resident of a EU Member State or of a country participating in Creative Europe programme;
- In the first phase, be implemented in one or more of the following sectors: visual and performing arts, music, literature, architecture and cultural heritage.
- Include an activity report delivered by the participant

The participants in the mobility scheme (artists and/or culture professionals) will take part in it as individual sub-contractors offering a service for the experimentation of the scheme and delivering a report.

In addition, the tenderer will make sure that the sample of mobility actions' beneficiaries is representative and constitutes a significant critical mass to meet the objectives of the task.

Outputs

During the exploratory period of the pilot, the tenderer shall organise and administrate as many individual mobility actions as possible having duration per individual of a minimum of 15 days up to a maximum of 85 days. The tenderer will have to organise and administrate at least 3000 individual mobility units covering a minimum of 500 participants (IMU) ⁸. The contract will cover travel and the fee for the participation of the individual sub-contractors as well as all the costs related to the IMU.

The Commission will assess and discuss with the contractor the proposed implementation details of the IMU, the template of the compulsory activity report, as well as the methodology and criteria for the selection of the participants, which must respect the principles and rules of EU public procurement, namely regarding equal treatment, integrity and transparency. The Commission will give its approval before final operational arrangements can be made.

The participants (the IMU individual sub-contractors) could receive this administrative support to cover their travel costs and a fee for their contribution to the experimentation. The contractor will be responsible for the implementation of the fee scheme, the scope of the performance to which it is linked as well as the terms and conditions for their awarding. After selection and approval of the applications, the contractor will transfer the amount of the fees directly to the individual sub-contractors. 75% of the total amount will be handed out upon start; the final 25% will be released upon completion of the project according to the submitted project plan, and after the evaluation and approval of the compulsory activity report delivered by the participants. These reports must be delivered to the Commission as an annex to the final report mentioned in point 3.

⁸ An individual mobility unit corresponds to five complete days of participation in a cross border mobility action per individual, excluding travelling time.

B. Creation of a mobility portal or platform to:

- provide access to mobility opportunities and to information sources;
- allow online application and selection process as well as close monitoring of the mobility actions (activities)
- provide data and statistics on mobility in the cultural and creative sectors

Outputs

The tenderer will provide strategic data (statistics, indicators, etc...) in order to help:

- define the specificity of individual mobility in the creative and cultural sectors,
- nurture a strategic communication and valorisation of results' plan; and
- formulate practical and actionable policy recommendations

C. Design and implementation of a communication and information strategy as well as a methodology for the dissemination and valorisation of results

The tenderer will conceive and implement a strategic communication and information plan as well as a methodology for the valorisation and dissemination of results. The methodology should follow and fit the pilot life-cycle and the target groups. In this regard, the tenderer will notably make the most of the social media.

2.4.3. Task III - Policy recommendations

Based on the outputs of tasks I and II, the tenderer will formulate policy recommendations to the European Commission, the European Parliament and the Member States to prepare the ground for an individual mobility scheme for artists and culture professionals' from 2021 onwards in the next generation of EU programmes.

2.5. Input by the contracting authority

In the analysis, particular attention will be given to the specific situation of creators. The analysis should go beyond updating the existing information and avoid mere repetition of already available descriptive information on the topic, already provided by different reports (See section 2.1 Background).

While recognising the difficulties of covering the different elements of this tender, the European Commission is seeking for an ambitious and forward looking approach in implementing this pilot scheme.

At operational level, the Tenderer can rely on:

- The Creative Europe Desks Network

- Information on Creative Europe projects

2.6. Scope and duration

The duration of the action subject to this call for tender is 14 months.

In this testing phase, the action will be limited to the Member States and the participating countries of Creative Europe⁹ and to the following sectors: visual and performing arts, music, literature and architecture

2.7. Indicative Timetable

T0	Contract start
T0 + 4 weeks	Kick-off meeting with the European Commission
T0 + 6 weeks	Submission of draft inception report (See section 2.8)
T0 + 8 weeks	Submission of the inception report (see section 2.8) + first interim payment (20% of the total contract value)
T0 + 4 months	Submission of the draft interim report (See section 2.8) + 2 nd meeting with the European Commission
T0 + 4 months	Launch of the Mobility Pilot scheme
T0 + 5 months	Submission of the interim report (See section 2.8) + Second interim payment (60% of the total contract value)
T0 + 12 months	Submission of the draft final report (see section 3) + 3 rd meeting with the European Commission
T0 + 14 months	Submission of the final report (including actual costs) + meeting with the European Commission + Final payment (maximum 20% of the total contract value based on final report including actual costs)

⁹ https://ec.europa.eu/programmes/creative-europe/content/creative-europe-participating-countries_en

2.8. Inception and Interim reports requirements

Inception report

Within 6 weeks after the signature of the contract and following a kick-off meeting with the Commission (which will take place 3 to 4 weeks after the signature of the contract), the contractor shall supply the Commission with an inception report, including:

- a detailed outline of the proposed business model, including the individual mobility activities
- an outline of the communication and information strategy

It shall not exceed 30 pages, annexes excluded.

Interim report

An interim report shall be provided within 5 months following the signature of the contract. The report shall provide information about the implementation and administration of the operational infrastructure, and an initial analysis of the data collected in the field. The contractor must be in a position to provide a preliminary overview of the business model, a preliminary overview of the mobility portal or platform.

The communication and information strategy, the policy recommendations strategy shall also be delivered with the interim report.

The Commission Decision of 12 December 2011 on the reuse of Commission documents applies to the results of this contract.¹⁰

This Decision determines the conditions for the reuse of documents held by the Commission or on its behalf by the Publications Office of the European Union (the Publications Office) with the aim of facilitating a wider reuse of information, enhancing the image of openness of the Commission, and avoiding unnecessary administrative burdens for re-users and the Commission services alike.

3. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES

The contractor must deliver the study and other deliverables as indicated below.

¹⁰ COMMISSION DECISION of 12 December 2011 on the reuse of Commission documents (2011/833/EU) <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2011:330:0039:0042:EN:PDF>

Final report

The final feasibility study report must include:

- an abstract of no more than 200 words and an executive summary of maximum 6 pages, in English, French and German;
- Comprehensive information on all the activities and approaches in pursuit of the tasks carried out;
- Problems encountered, solutions found and their impact on the outcomes achieved;
- Key recommendations for the European Commission, national, regional and local authorities;
- The deliverables as mentioned under task I, II and III;
- A glossary of key terms and a bibliography;
- Specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- The following disclaimer:

“The information and views set out in this [report/study/article/publication...] are those of the author(s) and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included in this study. Neither the Commission nor any person acting on the Commission’s behalf may be held responsible for the use which may be made of the information contained therein.”

Publishable executive summary

The publishable executive summary must be provided in both in English, French and German must include:

- The operational and administrative infrastructure proposed;
- The mobility portal or platform;
- The policy recommendations;
- The communication and information strategy;
- Specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;

The following disclaimer: *“The information and views set out in this report are those of the author(s) and do not necessarily reflect the official opinion of the Commission. The Commission does not guarantee the accuracy of the data included in this study. Neither the Commission nor any person acting on the Commission’s behalf may be held responsible for the use which may be made of the information contained therein.”*

Requirements for publication on Internet

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

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

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

3.1. Structure

3.2. Graphic requirements

The contractor must deliver the study and 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

4. EVALUATION AND AWARD

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

1. Verification of compliance with the minimum requirements set out in these tender specifications
2. Verification of exclusion and selection criteria based on Declaration on the honour.
3. Evaluation of tenders on the basis of the award criteria
4. Selection on the basis of selection criteria of tenderers whose tenders have been ranked first and second in relation to the assessment of the award criteria and to the ranking formula

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

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

4.1. 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.

- **Quality of the proposed methodology** (55 points - – minimum score 50%)

This criterion will assess the relevance and quality to which the proposal addresses the tasks of the action (as described under section 2.4 and 2.5) and contributes to their realisation through the planned activities and objectives.

1.1 Task I (15 points – minimum score 50%):

1.2 Task II (30 points – minimum score 50%)

1.3 Task III (10 points – minimum score 50%)

- **Organisation of the work and resources** (35 points – minimum score 50%)

This criterion will assess how the roles and responsibilities of the proposed team and of the different economic operators (in case of joint tenders, including subcontractors if applicable) are distributed for each task. It also assesses the global allocation of time and resources to the project and to each task or deliverable, and whether this allocation is adequate for the work. The tender should provide details on the allocation of time and human resources and the rationale behind the choice of this allocation. Details should be provided as part of the technical offer. It is not a budget requested as part of the financial offer.

- **Quality of the proposed communication strategy** (10 points – minimum score 50%)

This criterion will assess the quality and relevance of the communication strategy proposed

Tenders must score minimum 50% for each criterion and sub-criterion, and minimum 70 % in total. Tenders that do not reach the minimum quality levels will be rejected and will not be ranked.

4.2. 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 60/40 is given to quality and price.

score for tender X	=	$\frac{\text{cheapest price}}{\text{price of tender X}}$	*	100	*	price weighting (in %)	+	total quality score (out of 100) for all award criteria of tender X	*	quality criteria weighting (in %)
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4.3. Verification of non-exclusion

All tenderers must provide a declaration on honour (see Annex 2), 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 10% and 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 the standstill period.

The standstill period is a period of 10 days during which the contract cannot be signed by the contracting authority. This period counts from the day after simultaneous dispatch of the notification by electronic means to all tenderers whose tenders have been considered regular at the opening phase (Art. 161 RAP).

If, due to technical reasons, the dispatch is made when using other means, the standstill period is 15 days (Article 171 RAP). If the requested evidence is not submitted in due time, the Contracting Authority can award the Contract to the Tenderer evaluated as the next-best.

This requirement applies to each member of the group in case of joint tender and to all identified subcontractors whose share of the contract is above 10% and 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 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.

4.4. 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.

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

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 2), 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 4.1) so only one declaration covering both aspects should be provided by each concerned entity.

In order to speed up the evaluation process, the tenderers are also required to provide, at the time of submitting their tender, the evidence that they fulfil the selection criteria.

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

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

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 if it has not been provided with the Legal Entity Form:

- For legal persons, a legible copy 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.

Economic and financial capacity criteria

In order to prove their economic and financial capacity (in case of joint tender, the combined capacity of all members of the consortium and identified subcontractors), tenderers must comply with the following criteria:

- Annual turnover of the last two financial years above € 1.500.000.

- Satisfactory results following the analysis of the financial capacity which will be performed by the Contracting Authority based on the following methodology:

http://ec.europa.eu/dgs/education_culture/calls/evaluation-procurements-2016_en.htm

The following evidence should be provided:

a. Contracts worth EUR 144 000 or less

For contracts of this type, proof of financial capacity consists of a declaration on the honour by the economic operator (see Annex 2, 'Declaration on the honour').

b. Contracts worth more than EUR 144 000 but equal to or less than EUR 260 000

For this category of contracts, in addition to the declaration on the honour in Annex 2, proof of financial capacity is also provided by a statement of overall turnover and turnover specifically related to the supplies or services covered by the contract for the last two financial years for which accounts have been closed.

However, in case of doubt, the evaluation committee reserves the right to request supporting documents and to carry out the financial analysis described in point 4 of the abovementioned methodology.

Along similar lines, entities falling into one of the following high-risk categories must provide proof of their financial capacity (see points 3.3, 3.4 and 3.5 of the methodology) and are required to undergo the financial analysis provided for in point 4 of the methodology:

- newly-established entities which have existed for less than a year and for which no financial history is available;
- new entities which have existed for between one and three years;
- entities against which one or more expired and unpaid recovery orders have been issued by DG EAC;
- entities that are the subject of suspicions of or findings relating to serious administrative errors or fraud;
- entities against which legal proceedings have been brought for serious administrative errors or fraud.

c. Contracts worth more than EUR 260 000

For contracts worth more than EUR 260 000, proof of economic and financial capacity is provided by the following documents:

- the declaration on the honour in Annex 2.
- the economic and financial capacity analysis form showing the financial data of the economic operator, completed and signed by the operator (see Annex 3, 'Economic & financial capacity form');
- for economic operators required under national law to keep a complete set of accounts: the annual accounts (balance sheet, income statement and annexes) for the last two years for which accounts have been closed;
- for economic operators required under national law to keep a simplified set of accounts: the statement of expenditure and revenue and the annex showing assets and liabilities for the last two financial years for which accounts have been closed;
- in all cases, a statement of overall turnover and turnover specifically related to the supplies or services covered by the contract for the last two financial years for which accounts have been closed.

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 Commission reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

Technical and professional capacity criteria and evidence

A. Criteria relating to tenderers

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

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

- **Criterion A1:** The tenderer must prove experience in the field of mobility and in the cultural and creative sectors as well as in drafting reports and recommendations.

Evidence A1: the tenderer must provide references for 2 projects delivered in these fields in the last three years with a minimum value for each project of € 20.000.

- **Criterion A2:** The tenderer must prove capacity to work in English.

Evidence A2: the tenderer must provide references for 2 projects delivered in the last three years showing the necessary language coverage.

- **Criterion A3:** The tenderer must prove capacity to draft reports in English

Evidence A3: the tenderer must provide one document of at least 10 pages (report, study, etc.) in this language that it has drafted and published or delivered to a client in the last two years. The verification will be carried out on 5 pages of the document.

- **Criterion A4:** The tenderer must prove its capacity to work in 10 EU countries.

Evidence A4: the tenderer must provide references for 2 projects delivered in the last three years. The combination of projects must cover the required geographical scope.

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.

B1 - Project Manager: At least 5 years experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project of a similar size and coverage (at least 5 countries covered), with experience in management of team of at least 5 people.

Evidence: CV

B2 - Language quality check: at least 3 members of the team should have at least C1 level in the Common European Framework for Reference for Languages¹¹ in English and one other European official language.

Evidence: a language certificate or past relevant experience.

B3 - Expert in cross-border mobility projects: At least 5 years of professional experience. Relevant higher education degree or equivalent professional experience and at least 5 years' professional experience in the field.

Evidence: CV

B4 - Team for data collection: collectively the team of at least 3 people should have knowledge of English and another official EU language and proven experience of 3 years in data collection techniques.

Evidence: CV and a language certificate or past relevant experience.

¹¹ See http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp

5. ANNEXES

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

- Annex 1 : Information on the tenderer
- Annex 2 : Declaration on Honour
- Annex 3 : Economic & Financial Capacity Form
- Annex 4 : Price
- Annex 5 : Draft Contract