



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

**CALL FOR TENDERS**

***"ERASMUS for Young Entrepreneurs-Support Office"***

***EASME/COSME/2016/023***

**TENDER SPECIFICATIONS**

***Open Procedure***

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**EASME/COSME/2016/023**

**"ERASMUS for Young Entrepreneurs – Support Office"**

**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 (EC), is launching this invitation to tender for the selection of a Support Office that will coordinate and support the activities of the European Partnerships (EPs)<sup>2</sup> and Intermediary Organisations (IOs)<sup>3</sup> of the Erasmus for Young Entrepreneurs Programme.

**1.2. BACKGROUND INFORMATION AND CONTEXT**

In June 2008, the European Commission adopted the 'Small Business Act' for Europe (SBA<sup>4</sup>), recognising the central importance of small and medium-sized enterprises (SMEs) in the EU economy and providing a comprehensive SME policy framework for the EU and its Member States. The SBA aims at improving by policy makers the overall approach to entrepreneurship, to irreversibly anchor the 'Think small first' principle in policy-making from regulation to public service, and to promote the growth of SMEs by helping them tackle those problems which hamper their development.

The SBA also sets out the principle 'create an environment in which entrepreneurs can thrive and entrepreneurship is rewarded' (Principle I of the SBA). As a concrete follow-up to this aim, the Commission organised a call for proposals in 2008 under the pilot project 'ERASMUS for Young Entrepreneurs' – which was followed by a preparatory action and subsequent calls for proposals in 2009 – 2016.

The Erasmus for Young Entrepreneurs Programme ([www.erasmus-entrepreneurs.eu](http://www.erasmus-entrepreneurs.eu)) is a cross-border exchange programme which gives new or aspiring entrepreneurs the chance to learn from experienced entrepreneurs running small businesses in other European countries. The exchange of experience takes place during a stay of one to six months with the experienced entrepreneur. This allows the new entrepreneur to acquire the skills needed to run and grow a small firm. At the same time, the host entrepreneur benefits from the new entrepreneur's

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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> A European Partnership (EP) is a consortium of Intermediary Organisations who have signed a grant agreement with EASME following a call for proposals. Each EP is composed of one Lead IO (i.e. the coordinator) and minimum four IOs from different participating countries (i.e. partner organisations).

<sup>3</sup> Through annual calls for proposals, a network of local contact points (called Intermediary Organisations) has been created. This network promotes the Programme and recruits and selects the New and Host Entrepreneurs who participate in an Erasmus for Young Entrepreneurs exchange. The local contact points are business support organisations (such as chambers of commerce, incubators, innovation centres, higher education institutions...).

<sup>4</sup> COM(2008)394 of 25.06.2008 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

knowledge and input and gets the opportunity to familiarise himself with other European markets.

In 2016 there are 212 active Intermediary Organisations (IOs) (32 consortia) in 30+ countries co-financed by the Commission. The total number of exchanges is expected to be 2000 per year.

The Commission Decision C(2016)63 of 18.01.2016 as modified on 14.07.2016 by C(2016)4344 provides the selection of a new Support Office body. This body is envisaged to provide support and coordination to European Partnerships, Intermediary Organisations, the EASME and the European Commission and to raise awareness on the Erasmus for Young Entrepreneurs Programme on a pan-European level.

#### Legal basis

The present call for tenders is based on the Regulation (EU) no 1287/2013 of the European Parliament and of the Council of 11 December 2013 establishing a Programme for the Competitiveness of the Enterprises and small and medium-sized enterprises (hereafter "COSME") (2014-2020) and repealing Decision No 1639/2006/EC. More particularly, it is based on the Commission Implementing Decision of 14.07.2016 "amending Commission Implementing Decision C(2016) 63 concerning the adoption of the Work Programme for 2016 and the financing for the implementation of Programme for the Competitiveness of Enterprises and small and medium-sized enterprises" ref. C(2016)4344 final.

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

EASME wishes to enter into a service contract.

The purpose of this tender is to select an entity – the Support Office – that will coordinate and support the activities of the European Partnerships (EPs) and Intermediary Organisations (IOs) of the Erasmus for Young Entrepreneurs Programme. The Support Office must ensure overall coherence and consistency of the work undertaken by European Partnerships. Any private or public entity active in the field of business support, consulting, public affairs and public relations and with experience and knowledge on EU affairs can participate in this call for tenders.

The key role of the Support Office is to assist and support the EASME and the EC<sup>5</sup> in the management of the Programme and to contribute to promotion and communication activities. Overall, the Support Office must contribute significantly to the pan-European dimension of the mobility scheme and be able to cover all participating countries<sup>6</sup>. Therefore, a good knowledge of EU policies and projects is essential.

The successful management of the Erasmus for Young Entrepreneurs Programme very much relies on an effective cooperation between the Support Office, EASME and EC. Whilst the EASME and EC will have overall oversight of the tasks and responsibilities carried out by the Support Office, the Support Office must be run autonomously and proactively and provide independent support to European Partnerships. The core task of the Support Office will be to work and coordinate with the IOs on a daily basis.

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<sup>5</sup> The first 6 cycles of the programme, were managed by the EC. Starting with cycle 7 as of 2014 call, the management of the programme was delegated to EASME. The Support Office is to assist and report in parallel to both bodies (EASME and EC)

<sup>6</sup> Up to date information regarding the countries that participate in COSME can be found at <http://ec.europa.eu/growth/smes/cosme/>

The successful tenderer must ensure the smooth succession from the incumbent Support Office. A transition period and handover meetings will facilitate the take-over and will provide the successful tenderer with an adequate overview of the current state of play. The successful tenderer should make most use of existing material, best practices and established procedures in order not to duplicate work already undertaken. As the Erasmus for Young Entrepreneurs Programme has now been running for more than seven years, it is time to further streamline the management of the Programme. The successful tenderer will efficiently deliver the below described tasks and milestones, whilst at the same time applying creative thinking to further improve the management and operation of the Programme.

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

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

###### ➤ **Work Package 0: Taking over from the previous Support Office**

Tenderers must outline how they plan to ensure a smooth transition (at the beginning of their contract) from the incumbent Support Office and how the taking over meetings with the incumbent Support Office, EASME and the EC would be set up.

The taking over period will last from 01.02.2017 – 30.04.2017

The efforts and resources needed for this task must also be specified.

###### ➤ **Work Package 1: Overall Deliverables**

In line with the general requirements outlined above and in order to document the actions undertaken, the Support Office will have to provide the following reports and deliverables (see Section 1.10):

- Continuous coordination and reporting to EASME and the EC;
- Interim report (half way through the contract);
- Final report (at the end of the contract).

Please note that this list is not exhaustive and additional elements could be added as the need arises.

There will be monthly meetings (Steering Committee meetings) between EASME/EC and Support Office to discuss the coordination issues that arise in the EYE Network.

The tenderers must propose how to organise the continuous communication and reporting activities vis-à-vis the EASME and the EC in a timely and efficient fashion.

###### ➤ **Work Package 2: Promotion and Communication Strategy**

The successful tenderer will be responsible for developing and implementing the overall Communication Strategy in order to raise awareness of the Programme on European level and to effectively complement the promotional activities of IOs in the participating countries. Any form of promotion and publicity must make the EU support for the project clearly visible. In the technical offer the tenderers must also elaborate on the expected outcome and impact of promotional and communication activities and provide relevant indicators. It should be noted

that the EASME and the EC are responsible for communication on and promotion of the Programme.

#### Overall Promotion and Communication Strategy

Tenderers must implement and suggest improvements of the existing Promotion and Communication Strategy<sup>7</sup> which for instance includes the following means of communication and actions:

- Press communication – which must be complementary to the promotional activities of the EC and of IOs (tenderers must be able to prove established press contacts in the area of entrepreneurship/SMEs);
- Identification of high impact events and regular participation of the Support Office (keynote speaker/panels);
- Assisting the EASME and the EC and IOs regarding other relevant events where participation of the Commission (EU level) or of IOs (national level) is deemed beneficial;
- Providing input (in form of templates etc.) and assistance for communication activities of IOs on national, regional and local level;
- Preparation and execution of a European-wide press/media campaign in coordination with IOs (optional);
- Production of Newsletters (6 per year) on topics of general interest for the IOs; 2 out of 6 Newsletters will be fully dedicated to follow-up Network Meeting;
- Development and management of the MEP Ambassadors Network.

#### Promotional Material

Tenderers must describe how they would update existing material and develop new promotional material if needed and make effective use of existing material including but not limited to:

- Brochures/leaflets/videos with general information on the Erasmus for Young Entrepreneurs Programme;
- Brochures to 'attract' (host and new) entrepreneurs;
- Brochure to celebrate certain milestone reached by the programme (e.g. 5000/10000 matches; 10 years of the programme);
- Identifying suitable success stories from the programme and producing a success story video (1 per year);
- EYE Programme presentation video with interviews of EYE stakeholders (e.g. EC, EASME, IOs, participating new entrepreneurs (NEs), host entrepreneurs (HEs));

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<sup>7</sup> This document will be provided to tenderers upon request.

- Press release template for IOs;
- Success stories guidelines and templates for IOs;
- Press Packs for promotional activities of IOs, Support Office etc., including regularly updated statistics and fact sheets about the Programme.

Tenderers must define in their offer any other 'innovative' means of promotion they intend to use.

### Social Media Strategy<sup>8</sup>

Tenderers must implement and suggest improvements of the Social Media Strategy with a key focus on proactive involvement and visibility of the Erasmus for Young Entrepreneurs Programme on relevant networks and social media channels. The Social Media Strategy will be provided by the current Support Office during the handover period. The successful tenderer will be in charge of the following elements (among other things):

- Posting 'teasers' on the various social media to attract attention;
- Live tweeting from programme events
- Posting relevant news articles;
- Posting updates on the Programme (how many exchanges, how many entrepreneurs, preferred countries, available Host Entrepreneurs, upcoming meetings, success stories etc.);
- Replying in a constructive/informative way to questions posted;
- Moderating discussions; deleting irrelevant/abusive posts;
- Providing regular feedback on statistics, i.e. number of hits, likes, follows, etc.;
- Exploiting the marketing potential of social networks.

### Proposal for future synergies with other relevant EU programmes

The tenderers must present in their offers a draft proposal for future synergies with other suitable programmes (e.g. Enterprise Europe Network (EEN)). During the execution of the contract the proposal will be further developed and implemented. This will be considered as a deliverable of the project.

### Networking

Although networking will not be considered a core activity of the Support Office, it should be considered an integral part of the Promotion and Communication Strategy to raise awareness of the Programme. The attendance at events with high potential impact provides a unique opportunity to network with key stakeholders such as business support organisations (potential future IOs), potential Host and New Entrepreneurs and political stakeholders. Tenderers should

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<sup>8</sup> Social Media Strategy is part of the existing Promotion and Communication Strategy and will be provided to tenderers upon request.



demonstrate their networking activities with the above mentioned stakeholder groups in the past two years. Furthermore, the tenderers should also describe how they will further ensure the access to all above mentioned stakeholders. The tenderers should suggest further improvements to the Alumni network strategy of the programme<sup>9</sup> and start its implementation (around 10.000 entrepreneurs).

➤ **Work Package 3: Operational Support**

Daily Support and Guidance to Intermediary Organisations and Entrepreneurs (Help Desk)

The successful tenderer will be fully responsible for the day-to-day support to IOs via written and face-to-face communication. This interaction must ensure a quality standard leading to the successful implementation and execution of exchanges within the framework of the Programme. Past experiences and best practices will be discussed in the handover meetings with the incumbent Support Office. Tenderers must describe the methodology they will apply in order to streamline the management and reporting procedures of IOs (vis-à-vis their Lead IOs and the Support Office) and how they will monitor the performance of IOs. Tenderers must also outline how they intend to involve the EASME and the EC in this context in order for the EASME and the EC to have overall oversight.

Daily support includes, among others, the following activities:

- Help Desk for any arising questions (based on previous experience it is likely that the Support Office receives an average of 20 emails and 10 phone calls per day);
- Drafting of answers to Frequently Asked Questions (FAQ) and compilation and updating of FAQs to be published on the programme website;
- Creation of Webinar Sessions with different programme related topics (e.g. “How to recruit the best entrepreneurs (NE and HE)”, “How to improve the quality of the applications”, etc.) to be recorded and published on the programme website;
- Propose how new and underperforming IOs will be coached and trained;
- Assistance with the IT Tool<sup>10</sup>;
- Assistance with the daily implementation of the Programme (e.g. questions regarding the eligibility of entrepreneurs, the financial assistance to be paid to new entrepreneurs; problems relating to ongoing exchanges);
- Assistance with the promotion of the Programme on national level (see Promotion and Communication Strategy);
- Reassignment of 'floating' entrepreneurs<sup>11</sup> (entrepreneurs without an assigned IO) and other means of problem solving which may arise due to the end of a Programme Cycle<sup>12</sup>.

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<sup>9</sup> This document will be provided to tenderers upon request

<sup>10</sup> The IT Tool is the database of accepted entrepreneurs available for matching. It allows for matchmaking between a New and a Host Entrepreneur and to monitor the progress of relationships/exchanges. The IT Tool is a key instrument for IOs to implement the Programme. Please refer to the Admin/Support Office Manual for the Management Tool.

In line with the above, the successful tenderer will be also responsible for the support and guidance of entrepreneurs who are contacting the Support Office (by phone and email) with various questions on the Programme. These may range from general questions on the Programme (from entrepreneurs who have not (yet) registered) to very specific questions on the rules and procedures (from already accepted entrepreneurs). Entrepreneurs may also contact the Support Office if they are not satisfied with the support provided by their respective IOs (e.g. IOs are not responding to their emails, provide insufficient answers to problems encountered, etc.).

Tenderers must provide a sample depicting how they will set up an adequate management system for the Help Desk for IOs and entrepreneurs. The management system will cover issues such as response time to questions and procedures to be followed (e.g. when to consult with the EASME and the EC) in order to ensure coherence.

### Monitoring

The successful tenderer must ensure that IOs regularly monitor and follow-up on outstanding actions (e.g. delays in accepting registered entrepreneurs; delays in approving proposed relationships; delays in finalising the feedback questionnaire). A specific screen/function in the IT Tool provides an overview of outstanding actions on EP level. The Support Office has to review each case and then contact the responsible EP in order to ensure that the problem is solved. If the problem is not solved by the EP within a time frame of three weeks the Support Office has to take actions vis-à-vis the EP to solve the issue. In case of persistent problems, the problem will be referred to the EASME and the EC with the appropriate documentation. Based on this monitoring exercise, the Support Office has to provide detailed input to the EASME and the EC for the mid-term review meetings with EPs. The Support Office is expected to take part in every review meeting that will take place. The review process particularly focuses on underperforming EPs (or underperforming IOs within an EP) and will be held between the EASME /Commission, Support Office and the whole EP.

Since the programme is more and more known in the different participating countries and constantly growing with presently over 1000 relationships a year, it is now necessary to focus more on the quality of exchanges than on the quantity. Therefore, the successful tenderer must develop a comprehensive monitoring strategy allowing for a regular and efficient quality monitoring of relationships, from applications to feedback of participating entrepreneurs (including potential plagiarism or profiles or business plans, low quality applications accepted, ineligible relationships, etc.). To assure a high quality of the applications received, the Support Office will receive via the IT Tool 15% of the total number of the applications (approximately 400-450 applications per year) that are in the last approval step before the exchange can start. The analysis of the applications received has to be done thoroughly and in line with all the programme rules. The Support Office has to report on monthly basis during the Steering Committee meeting with the Commission and EASME on the quality of the applications checked.

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<sup>11</sup> IOs which are no longer participating in the next Cycle have to reassign their accepted entrepreneurs to other IOs. Alternatively, entrepreneurs can select a 'new' IO themselves. If no reassignment or new selection takes place, entrepreneurs will enter a 'floating' status.

<sup>12</sup> Each call for proposals and subsequent award decision introduce a new Cycle of the Erasmus for Young Entrepreneurs Programme. Each Cycle with a duration of 2 years has a different set of IOs. Cycle 7 of the Programme started on 1<sup>st</sup> February 2015, Cycle 8 on 1<sup>st</sup> February 2016. In parallel with the annual cycles, in 2016 a Framework Partnership Agreement (FPA) was launched for a period of 5 years (2016-2021) where at least half of the consortium partners including the coordinator (Lead Intermediary Organisation, LIO) must have previous 4-years implementing experience with Erasmus for Young Entrepreneurs projects.

Within the framework of monitoring the ongoing progress of the Programme, the successful tenderer will be responsible for drafting a conclusive summary report and analysis of the six-monthly activity reports based on the reports submitted by the IOs., the interim technical reports and the final technical implementation reports submitted by the IOs. This report shall assess the performance of IOs quantitatively and qualitatively. Tenderers will outline a methodology for these summary reports in their submissions.

### Network Meetings

The successful tenderer will be responsible for the organisation of Network Meetings (see table in point 1.10.3 for an indicative schedule of meetings) in consultation with the EASME and the EC. The Network Meetings – which usually run for 2 full days – are designed to provide extensive opportunity for the IOs to get to know each other, to exchange experience and best practices, to obtain more guidance on critical strategic and other issues and on new aspects of the programme and to match entrepreneurs profiles on the spot. At the same time, they will allow IOs to ask concrete questions about the implementation of the Programme to the Support Office and the EASME and the EC.

Within this context, the successful tenderer will be responsible for the following issues (please note that this list is non-exhaustive):

- Organisation of the venue<sup>13</sup> (please note that so far the Network Meetings were predominantly held in Brussels but can also take place in any of the COSME Participating countries<sup>14</sup>);
- Catering during the Network Meeting (1 lunch for all participants and the 2<sup>nd</sup> lunch for the Lead Intermediary Organisations (LIOs - around 50 persons)) and organisation of one Networking Dinner in a suitable venue;
- Drafting of the agenda (please note that every Network Meeting will focus on different topics – ranging from how to use the IT Tool, how to successfully make matches to how to write the final technical implementation report – depending on the progress of the Programme Cycle);
- Sending out invitations to IOs and corresponding follow-up (for instance if one of the IOs is asked to give a presentation at the Network Meeting);
- Presentation on the current status of the Cycle/Programme and presentation on any other relevant issues (depending on the agenda);
- Chairing of the Q&A session in cooperation with the EASME and the European Commission.
- Implementation and analyses of participants feedback questionnaire

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<sup>13</sup> The cost for the venue, the catering and the dinner must be included in the budget of the Support Office.

<sup>14</sup> <http://ec.europa.eu/growth/smes/cosme/>.

The successful tenderer shall draw up a suitable agenda based on relevant news, upcoming issues regarding the implementation of the Programme and other ad-hoc requests by IOs.

Tenderers are requested to outline how they would ensure that these Network Meetings are of added value to IOs. This must be done in the form of a sample agenda outlining how ideally a Network Meeting would be set up, which sessions would be included, how these sessions would benefit the IOs and how the IOs would be incentivised to proactively participate.

The tenderers must also propose how the participants' feedback given by the IOs during the Network Meeting should be collected and followed up.

The Network Meetings should serve for the IOs, but also for further improvements of the programme

### Website Management

The successful tenderer will be in charge of managing, updating and improving the dedicated Programme website (currently [www.erasmus-entrepreneurs.eu](http://www.erasmus-entrepreneurs.eu)).

The successful tenderer has to ensure that the website is continuously operational. Tenderers must describe how they would manage the website in an efficient manner ensuring up-to-date information at any time. Tasks include the following:

- Uploading of new success stories and videos;
- Uploading of promotional material;
- Uploading of other relevant documents such as User Guides for IOs and Host and New Entrepreneurs, Implementation Manual for IOs etc. (see list of documentation in Work Package 4);
- Uploading templates for reports;
- Management of FAQs and Press Room;
- Management of a "Intermediary Organisations' Corner" , including; Online Forum, information related to Network Meetings (e.g. overview of upcoming meetings; invitation letter, agenda, preparatory material before each meeting; proceedings, presentations, action list if relevant after each meeting, News Section, Photo Gallery etc.).
- Defining and implementing actions for continuous improvement of the website (e.g. improving the user-friendliness and the visual appeal of the website).
- Management of the website domain, including payment;

Tenderers must equally describe how they would develop and implement other creative tools/means to further optimise/improve the website as well as realise synergies with relevant programmes/sites (e.g. Enterprise Europe Network)

➤ **Work Package 4: Development of Documentation**

Manuals and Guides

During the previous Cycles of the Erasmus for Young Entrepreneurs Programme a considerable number of guides and manuals have been developed to ensure a high quality standard – which guarantees a successful implementation of the Programme across the board – and to assist IOs and entrepreneurs with the registration as well as with the matching process. The successful tenderer will be responsible for updating and modifying the following non-exhaustive list of documents (in cooperation and in consultation with the EASME and the EC):

- Implementation Manual for Intermediary Organisations (so-called "Quality Manual"<sup>15</sup>)
- IT Tool Manual for Intermediary organisations<sup>16</sup>
- IT Tool Manual for Host Entrepreneurs and New Entrepreneurs ;
- Registration guide for Host Entrepreneurs;
- Registration guide for New Entrepreneurs;
- Best practice guidelines;
- Programme Guide available at

<http://www.erasmus-entrepreneurs.eu/upload/Programme%20Guide%20EN%20May%202015.pdf>

Whilst tenderers will be able to use all existing documentation, they must outline other creative ideas for possible guidance material while improving existing or creating new documents thereby demonstrating their ability to further develop the management and documentation of the Programme.

➤ **Work Package 5: Handover of the Programme to the new Support Office Body**

Tenderers must outline how they will organise the handover at the end of their contract with the future Support Office.

The Handover period lasts 3 months and it will take place during the last three months of the contract.

The contractor will be responsible to handover the management of the Programme to the respective successor. The handover process would for instance include the following:

- Assisting in the hand-over process to the new Support Office body;
- Provision of information to the new Support Office body on the daily management of the Programme;
- Explanation on other operational matters;

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<sup>15</sup> This document will be provided to tenderers upon request;

<sup>16</sup> This document will be provided to tenderers upon request;

- Provision of guides and other existing material;
- Graphics source files and other PR products developed in the frame of the contract;
- Overview of programme and issues at hand.

#### **1.4.2. Geographical scope**

The services to be delivered will cover all countries participating in COSME programme<sup>17</sup>.

#### **1.5. INPUT BY THE CONTRACTING AUTHORITY**

The information and documents necessary for the performance of the tasks will be provided by the previous Support Office during the hand-over period under the supervision of EASME and EC (please see Work Package 0);

**Information documents:** Access to all programme documents mentioned in this call for tender can be requested at the following e-mail address: [EASME-PROCUREMENT@ec.europa.eu](mailto:EASME-PROCUREMENT@ec.europa.eu)

#### **1.6. GENERAL GUIDANCE ON METHODOLOGY**

The specific guidance on methodology to be used by the contractor to perform the tasks is presented in section 1.4.1 together with the description of each task.

#### **1.7. PERFORMANCE AND QUALITY REQUIREMENTS**

The table included under point 1.10.3 shows the expected results in concise and approximate terms, so as to give a general idea of what will be requested from the contractor.

The expected results must be in line with the tasks described in section 1.4.1 and the deliverables and milestones presented in section 1.10.

The contracting authority will monitor the level of satisfaction with the organisation of the Network Meeting and overall performance of the Support Office (e.g. timely delivery of the deliverables, overall IOs satisfaction)

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

It is expected that the contract is signed at the latest on **1<sup>st</sup> of February 2017**.

The contract shall enter into force on **1<sup>st</sup> of February 2017** provided that both parties have already signed it. During the first 3 months there will be a handover period between the new Support Office and the current Support Office<sup>18</sup>. The duration of the tasks shall not exceed **27 months** from that date. The execution of the tasks shall not start before the date specified in the contract. Work will follow the timetable detailed below (see point 1.10.3)

The contract may be renewed for additional **24 months** at the request of the contracting authority depending on the future needs, performance of the contractor, budget availability.

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<sup>17</sup> Up to date information regarding the countries that participate in COSME can be found at <http://ec.europa.eu/growth/smes/cosme/>

<sup>18</sup> In case the new Support Office is the same as the current Support Office, there will be no need of handover. The contract shall not exceed 24 months and should start on 1<sup>st</sup> of May 2017.

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

The estimated maximum amount for the execution of all the tasks referred to in this call for tenders is **EUR 675.000** including all charges and expenses and excluding any renewals. No offer above this amount will be considered. It is estimated that the taking over period (lasting 3 months) will not exceed a budget of **EUR 10.000** and consequently the budget for the rest **24 months** is **EUR 665.000**.

The estimated maximum amount for the possible renewal is **EUR 665.000** including all charges and expenses. No price quotation above this amount will be considered. The price quotation for the possible renewal should strictly follow the rules as described under Section 3.7, Part E "Financial offer" of these tender specifications.

**The number of IOs to be served under normal situation within this contract is 180 IOs.**

This amount does not include a possible increase in the number of IOs above the maximum number estimated originally by 10 per year (see point 3.7).

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

The successful tenderer will provide the required deliverables, reports and documents in accordance with the conditions of the draft service contract. When requested in the contract the deliverables, reports and documents will accompany the invoices for payments.

Each report, document will be submitted in two copies in paper version and in electronic format compatible with Word in English.

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

The successful tenderer will be required to deliver the **Interim report on 30<sup>th</sup> of Month 12**

The interim Report shall outline the milestones achieved within the framework of the five Work Streams (see table below) in the respective reporting period. The report needs to describe the actions undertaken/documents delivered and the input achieved vis-à-vis various stakeholders (IOs, entrepreneurs, third parties). Particular attention should be paid to describe the daily management of the Programme. The Interim report must be submitted in English and should also include recommendations for improvement.

The detailed structure, the size and the sections of the Interim Report will be agreed with the EC and EASME.

The evaluation of the interim report will not only be based on the documents delivered but also on the impact of the work of the contractor on the effective management and successful implementation of the Programme.

EASME will review and approve the interim report in line with the special and general conditions outlined in the service contract. The report must demonstrate that the contractor has successfully and effectively implemented produced all deliverables required by the respective date. The contractor must provide proof of the effort invested.

EASME will comment on the Interim Report as indicated in the draft contract.

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

The contractor will be required to deliver the **Final report on 30<sup>th</sup> of month 24.**

The Final report will outline the milestones achieved within the framework of the five Work Streams (see table below) in the respective reporting period. The report needs to describe the actions undertaken/documents delivered and the input achieved vis-à-vis various stakeholders (IOs, entrepreneurs, third parties). Particular attention should be paid to describe the daily management of the Programme. The Final report must be submitted in English and should also include recommendations for improvement. The Final Report should be submitted in one original, one hard copy and an electronic version to EASME, the contracting authority.

The detailed structure, the size and the sections of the Final Report will be agreed with EASME.

Within the period indicated in the planning table mentioned below, the contractor will submit the Final Report in its definitive form, taking full account of the observations made by EASME/EC on the draft final report, either by following them precisely or by explaining clearly why they have not done so.

EASME will review and approve the Final report in line with the special and general conditions outlined in the service contract. The Final report must demonstrate that the contractor has successfully and effectively implemented produced all deliverables required by the respective date. The contractor must provide proof of the effort invested.

The evaluation of the Final report will not only be based on the documents delivered but also on the impact of the work of the contractor on the effective management and successful implementation of the Programme.

### **1.10.3. Other Deliverables**

In addition to the interim and final report mentioned in point 1.10.1 and 1.10.2, the contractor must deliver the documents, analyses, strategies and other punctual specific reports as outlined in the *Description of tasks* (see 1.4.1). The contractor is also required to organise and attend the Network Meetings and Lead IO Meetings<sup>19</sup>. Additionally, a kick-off meeting with the EASME and the European Commission and handover meetings with the incumbent Support Office must be organised. At the end of the contract, a handover process to the new Support Office body must be equally foreseen.

The table below summarises the **deliverables/milestones** on an indicative basis as well as the ongoing activities:

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<sup>19</sup> Lead IO meetings usually form integral part of the Network Meeting



<b>Deliverables/ Milestones</b>						
<b>Timing</b>	<b>Taking over from the previous Support Office (Work Package 0)</b>	<b>Overall Deliverables (Work Package 1)</b>	<b>Promotion and Communication (Work Package 2)</b>	<b>Operational Support (Work Package 3)</b>	<b>Documentation (Work Package 4)</b>	<b>Handover of the Programme (Work Package 5)</b>
Ongoing		<p>1. Continuous coordination and reporting to the EASME and the EC;</p> <p>2. Steering Committee Meetings – on monthly basis – continuous coordination and reporting;</p>	<p>1. Developing &amp; implementing the Promotion and Communication Strategy;</p> <p>2. Improve &amp; implement Social Media Strategy;</p> <p>3. Promotional material (brochures, leaflets, video, success stories etc);</p> <p>4. Press communication on European and national level (in coordination with EASME, EC</p>	<p>1. Daily Support and Guidance to (Lead) IOs ;</p> <p>2. Handling of direct questions from entrepreneurs (Help Desk);</p> <p>3. Conclusive summary report and analysis of six-monthly activity reports including final reports;</p> <p>4. Website management.</p>	<p>1. Documents have to be updated as the need arises;</p>	

			<p>and IOs);</p> <p>5. 6 Newsletters per year;</p> <p>6. European wide press/media campaign;</p> <p>7. Implementation of the Alumni Network.</p> <p>8. Proposal for future synergies; organising meetings and debates with relevant stakeholders</p>			
<b>Month - 3<sup>20</sup></b>	Kick-off meeting with EASME and EC; transition with incumbent Support Office including meetings					
<b>Month -3 or Month -2</b>				Network Meeting (Kick-off Meeting FPA); Lead IOs meeting;		

<sup>20</sup> The months -3,-2 and -1 are considered the handover period, preparatory months; The new Support Office will shadow and take over all the tasks from the current Support Office.

<b>Month -3 - Month - 1</b>	Transition with incumbent Support Office including meetings ;					
<b>Month 5</b>		Summary/Analysis of the 6 monthly monitoring reports submitted by IOs;		Network Meeting		
<b>Month 6/7</b>			Identifying suitable success stories from the programme and produce a success story video (1 per year)			
<b>Month 9/10</b>				Preparation of bilateral mid-term review meetings		
<b>Month 10/11</b>				Network Meeting (Kick-off Meeting cycle 9); Lead IOs Meeting		
<b>30<sup>th</sup> of Month 12</b>		Interim report and request for interim payment;		Propose how new and underperforming IOs are coached and trained about the implementation of the programme;		
<b>Month 17</b>		Summary/Analysis of the 6 monthly		Network Meeting		

		monitoring reports submitted by IOs;				
<b>Month 18/19</b>			Identifying suitable success stories from the programme and produce a success story video (1 per year)			
<b>Month 21/22</b>		Draft version of the final report;		Preparation of bilateral mid-term review meetings		
<b>Month 22/23</b>		EASME comments				
<b>28th of Month 22</b>		Summary/Analysis of the 6 monthly monitoring reports submitted by IOs;				
<b>Month 22/23</b>				Network Meeting (Kick-off Meeting); Lead IO Meeting		
<b>Month 24</b>		Final report and request for payment of balance;				

### 1.11. INTELLECTUAL PROPERTY RIGHTS

The European Union will acquire ownership of the deliverables, any other results and all intellectual property rights under the contract.

These results may be used by the European Union and by the contracting authority as stipulated in Article I.10 of the service contract.

The payment of the price will include any fees payable to the contractor about the acquisition of ownership of rights by the European Union including for all forms of exploitation and of use of the results.

The intellectual property rights provisions are foreseen in Articles I.10, I.14, I.15 and II.13 of the service contract.

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

The contractor must deliver the Final Report as indicated below.

### 2.1. CONTENT

#### 2.1.1. *Final report*

The final report must include:

- ✓ an abstract of no more than 200 words and an executive summary of maximum 6 pages, both in English and French;
- ✓ 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 EASME or of the European Commission. Neither EASME nor the European Commission, guarantee the accuracy of the data included in this study. Neither the EASME, nor the European Commission or any person acting on their behalf may be held responsible for the use which may be made of the information contained therein.”*

#### 2.1.2. *Publishable executive summary*

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

- ✓ specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- ✓ the following disclaimer:

*“The information and views set out in this report are those of the author(s) and do not necessarily reflect the official opinion of the EASME or of the European Commission. Neither the EASME nor the European Commission guarantees the accuracy of the data included in this study. Neither the EASME nor the European Commission or any person*

*acting on their behalf may be held responsible for the use which may be made of the information contained therein.”*

### **2.1.3. Videos – success stories**

The videos must be provided in English and must include:

- ✓ 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 EASME or of the European Commission. Neither the EASME nor the European Commission guarantees the accuracy of the data included in this video”.*

### **2.1.4. Requirements for publication on Internet**

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

### **2.1.5. Graphic requirements**

The contractor must deliver the 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)

### **Professional graphic design**

The contractor must apply the rules set out in Visual Identity Manual for the graphic design of both the cover page and the internal pages of the study. The professional font (EC Square Sans Pro) to be used for the study will be made available to the contractor free of charge upon acceptance of the terms and conditions of its use after contract signature. The use of templates for studies is exclusive to EASME contractors. No template will be provided to tenderers while preparing their tenders.

### 3. INFORMATION ON TENDERING

#### 3.1. PARTICIPATION

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

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

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

#### 3.2. CONTRACTUAL CONDITIONS

The tenderers will 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 tenders 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>21</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 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 with the leader on behalf of all members of the group, authorised by the other members via powers of attorney.

#### 3.5. SUB-CONTRACTING

Subcontracting is the situation where a contract has been or is to be established between the contracting authority and a contractor only and where the contractor or tenderer, in order to carry out that contract, enters into legal commitments with other entities for performing parts of the contract. The contracting authority has no direct legal commitment with the subcontractor(s). In practice, any third party involved in the contract implementation which has no legal link with the contracting authority but with the contractor will be considered as

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<sup>21</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).

subcontractor (e.g. any other company which does not participate in the contract execution but provides financial capacity).

Subcontracting is permitted in the tender but not for the core tasks and the contractor will retain full liability towards the contracting authority for performance of the contract as a whole. The EASME has no direct legal commitment with the subcontractor(s).

Tenderers are required to identify all subcontractors whose share of the contract is above 20% and 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, resources and methodology proposed. The tenderers will provide a practical and detailed description of the resources and services proposed to achieve the objectives and results set out in Sections 1.3 and 1.4 above.

- Part E: Financial offer (Annex 7)

The price for 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 number of IOs to be served under normal situation within this contract is 180 IOs.**

The quoted price must be a fixed amount which includes all charges (including travel and subsistence) both for the take-over period (3 months) and for the support to the 180 IOs (24 months). Travel and subsistence expenses are not refundable separately.



Please note that when calculating the estimates for the budget for renting the venues, catering, meeting rooms booking, etc (in preparation of the Network Meeting, etc) the tenderer will take into consideration an **average of 1,5 persons per IO**.

**The price for the take-over period will not be taken into consideration for the award of the contract.**

In addition, tenderers will include in their offer a unit price per year for the package of services in case the number of **IOs increases by 10**. When the number of IOs increases by more or equal to 5 IOs, the rounding will be done positive and negative when the number of IOs increases by less than 5 IOs.

**The number of IOs active in the programme will be established on 1<sup>st</sup> May of each year.** On the basis of this number extra unit price may be granted.

**The final award of the contract will be based on:**

a) **The price of serving 180 IOs for 24 months;**

**and**

b) **The price for the unit price of 10 extra IOs;**

- *A price must also be quoted to cover the tasks for the possible renewal (see above section 1.8). This 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. No offer above the maximum amount specified in Section 1.9 for the renewal will be considered. 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>22</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

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.

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<sup>22</sup> OJ L 124/36, 20.5.2003

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 supporting evidence 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>23</sup> shall amount to at least one and a half times the volume of the market as specified in point II.1.5. of the contract notice; this criterion applies to the tenderer as a whole, i.e. the combined capacity of all members of a group in case of a joint tender.

To this effect **tenderers are requested to submit a Statement of Turnover in accordance with Annex 2.1** of these tender specifications completed with the information requested.

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<sup>23</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.

**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.**

A. Criteria relating to tenderers:

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

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

Criteria	Evidence
✓ Criterion A1: The tenderer or lead partner in case of consortium must prove 4 years of experience in the field of business support, consulting, European Affairs, public affairs, and public relations.	✓ Evidence A1: Summary of the Annual Activity Report clearly indicating main activity and projects implemented in these fields in the last 4 years.
✓ Criterion A2: The tenderer must have good knowledge of the Commission's policy on SMEs and Entrepreneurship, the Programme for Competitiveness of Enterprises and SMEs (COSME); Good knowledge of EU policies and projects is also important.	✓ Evidence A2: 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 € 300.000. Please indicate the sums, dates and recipients.

<p>✓ Criterion A3: Tenderers must demonstrate sufficient ability and means available to carry out their tasks, notably in terms of human and technical resources (IT related) available and of quality systems in place (for evaluation purposes of internal processes and project management).</p>	<p>✓ Evidence A3: the tenderer must provide:</p> <ul style="list-style-type: none"> <li>• A statement of: <ul style="list-style-type: none"> <li>• the average annual manpower ;</li> <li>• the number of managerial staff ;</li> <li>• the technical resources;</li> </ul> </li> </ul> <p>all of the above in the last three years;</p> <ul style="list-style-type: none"> <li>• A description of the measures employed to ensure the quality of services and the description of the methodology used for collection of data and statistical analysis.</li> </ul>

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 will include, as a minimum, the following profiles.

- **Senior Project Manager** responsible for strategy development, overall management and oversight;
- **Project Coordinator** responsible for the daily management of the Programme as outlined in section 1.4.1 (description of tasks) and contact point for the European Commission;
- **2 Project Officers** responsible for daily operational support;
- **Event Manager** – responsible for organising the Network meetings, but also of identifying events where the EYE programme could be present etc;
- **Communication Officer** – responsible for all the press releases related to the EYE programme, newsletters etc.

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

Criteria	Evidence
<p>✓ <b>B1 - Senior Project Manager:</b> at least twelve years of work experience including five years of managerial experience, sound</p>	<p>✓ Evidence B1 - CVs</p>

project management experience on European level in the area of European affairs and in working with the European Commission and/or with businesses and business support organisations.	
✓ <b>B2 - Project Coordinator:</b> minimum of four years of project management experience and experience in working with business support organisation and/or European Affairs.	✓ Evidence B2 - CVs
✓ <b>B3 – Project Officers:</b> minimum two years of project management experience and experience in working with business support organisation and/or European Affairs.	✓ Evidence B3 – CVs
✓ <b>B4 - Event Manager:</b> minimum two years of experience in organising conferences and networking events.	✓ Evidence B4 – CVs
✓ <b>B5 - All the members of the team included in the B1,B2-B6 profiles will be able to draft reports in English and to successfully communicate in English with stakeholders.</b>	✓ Evidence B5 – language certificate, past relevant experience;  Level C1 from the European CV  <a href="http://europass.cedefop.europa.eu/resources/european-language-levels-cefr">http://europass.cedefop.europa.eu/resources/european-language-levels-cefr</a>
✓ <b>B6 - At least three members in the team must have expertise with surveying techniques, collection data and statistical analysis.</b>	✓ Evidence B6 – CVs

The Detailed curriculum vitae (in Euro pass format<sup>24</sup>) covering relevant educational and professional qualifications should be up to two A4 pages for each of the team members and must specify:

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

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

<sup>24</sup> <https://europass.cedefop.europa.eu/en/home>

**4.4. AWARD CRITERIA**

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

Tenders that receive less than 60% points of the maximum possible mark for the whole quality evaluation or less than 50% for each of the quality criteria will be eliminated and their final score will not be calculated. Tenders that do not reach the minimum quality levels will be rejected and will not be ranked.

The following award criteria will be applied:



No	Criteria	Points
1.	<p data-bbox="264 277 1361 344"><i>Quality, coherence and feasibility of the proposed strategies and methodologies used; quality of reporting mechanism</i></p> <p data-bbox="264 367 823 398"><u>This criterion will be evaluated on the basis of:</u></p> <ul data-bbox="312 439 1361 1659" style="list-style-type: none"> <li data-bbox="312 439 1361 539">○ The tenderer's proposal on how to organise the continuous communication and reporting activities vis-à-vis EASME and the EC in a timely and efficient manner (Work Package 1 – Overall deliverables);</li> <li data-bbox="312 580 1361 824">○ The tenderer's proposal for a plan for a smooth transition from the incumbent Support Office (SO) (at the beginning of the contract – 01.02.2017 – 30.04.2017) including handover meetings with the current SO and EASME/EC (Work Package 0 ); The plan should also contain a proposal of how they will organise the handover at the end of their contract with the future Support Office. The Handover period lasts 3 months and it will take place during the last three months of the contract. (Work package 5)</li> <li data-bbox="312 864 1361 1003">○ The tenderer's proposal for overall communication and promotion strategy, including indicators on the expected outcome and impact of promotional and communication activities (Work Package 2 – Promotion and Communication Strategy);</li> <li data-bbox="312 1043 1361 1144">○ The Tenderer's proposal to update existing material, develop new promotional material as well as how he/she will make effective use of existing material (Work Package 2 – Promotional Material);</li> <li data-bbox="312 1184 1361 1256">○ the proposal for future synergies with other relevant EU programmes (e.g Enterprise Europe Network (EEN)) (Work Package 2 – Synergies);</li> <li data-bbox="312 1296 1361 1469">○ The methodology proposed by the tenderer to streamline the management and reporting procedures of IOs (vis-à-vis their Lead IOs and the Support Office), to monitor the performance of IOs and how they intend to involve the EASME and the EC in this context to have overall oversight. (Work Package 3 – Daily Support and Guidance);</li> <li data-bbox="312 1509 1361 1659">○ The methodology proposed by the tenderer to draft a conclusive summary report and analysis of the six-monthly activity reports, the interim technical reports and the final technical implementation reports submitted by the IOs (Work Package 3 – Monitoring);</li> </ul>	30

<p>2.</p>	<p><i>Quality of the work programme and efficiency of project management (e.g. definition of tasks and responsibilities) in particular regarding operational support; realistic and detailed timetable and corresponding allocation of resources based on balanced and consistent work plan over the various work packages</i></p> <p><u>This criterion will be evaluated on the basis of:</u></p> <ul style="list-style-type: none"> <li>○ the Work Programme proposed by the tenderer (including the tasks and responsibilities, a detailed timetable, the corresponding allocation of resources) to fulfil the tasks mentioned in the various Work Packages;</li> <li>○ the procedure proposed by the tenderer to manage the website in an efficient manner ensuring up-to-date information at any time and fulfilling the tasks requested (Work Package 3 – Website Management);</li> <li>○ a sample overview of an adequate management system for the Help Desk (Work Package 3 - Daily Support and Guidance).</li> </ul>	<p>35</p>
<p>3.</p>	<p><i>Effective exploitation of access to relevant networks and efficient use of public relations based on sound strategies</i></p> <p><u>This criterion will be evaluated on the basis of:</u></p> <ul style="list-style-type: none"> <li>○ the tenderer's proposal on methods of networking with key stakeholders such as business support organisations to raise awareness of the programme (Work Package 2 –Networking).</li> <li>○ the improvements proposed by the tenderer to the strategy “Alumni Network of the programme” and the practical approach for its implementations (Work Package 2 – Networking).</li> </ul>	<p>20</p>
<p>4.</p>	<p><i>Innovative ability, creativity and added value of additional elements/ideas proposed to improve/enhance the respective work packages</i></p> <p><u>This criterion will be evaluated on the basis of the:</u></p> <ul style="list-style-type: none"> <li>○ tenderer's proposal on "innovative" means of promotion (Work Package 2– Promotional Material);</li> <li>○ sample agenda provided by the tenderer, outlining how ideally a Network Meeting would be set up, which sessions would be included, how these sessions would benefit the IOs and how the IOs would be incentivised to proactively participate. (Work Package 3 – Network Meetings);</li> <li>○ description of the methodology proposed by the tenderer to develop and implement other creative tools/means to further optimise/improve the website as well as realise synergies with relevant programmes/websites. (Work Package 3 – Website Management);</li> <li>○ creative ideas proposed for possible guidance material while improving existing or creating new documents (Work Package 4 – Manuals and Guides).</li> </ul>	<p>15</p>
<p><b>Total number of points</b></p>		<p>100</p>

#### 4.5. RANKING OF TENDERS

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

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

Score for tender X	=	$\frac{\text{Cheapest price}^{25}}{\text{Price for tender X}}$	*	100	*	price weighting (30%)	+	total quality score (out of 100) for all award criteria of tender X	*	quality criteria weighting (70%)
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The tender ranked first after applying the formula will be awarded the contract.

#### 4.6. INFORMATION TO TENDERERS ON THE FINAL EVALUATION

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

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

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

### 5. ANNEXES

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

Annex 1: Draft contract (for information)

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

- Annex 2.1. – Statement of turnover
- Annex 2.2. – Technical capacity

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

Annex 4: Power of attorney

Annex 5: Letter of intent for sub-contractors

Annex 6: Technical tender form

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<sup>25</sup> All the bids meaning only those that pass the quality thresholds referred to the qualitative award criteria (section 3.4.)

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

Annex 8: Checklist for Submission