



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

CALL FOR TENDERS

***Supporting international cluster and business network
cooperation through the further development of the European
Cluster Collaboration Platform***

EASME/COSME/2014/023

TENDER SPECIFICATIONS

Open Procedure

TABLE OF CONTENTS

1.	TECHNICAL SPECIFICATIONS.....	4
1.1.	INTRODUCTION.....	4
1.2.	BACKGROUND INFORMATION AND CONTEXT.....	4
1.3.	GENERAL AND SPECIFIC OBJECTIVES	6
1.4.	SCOPE AND DESCRIPTION OF TASKS	7
1.4.1.	Geographical scope	7
1.4.2.	Indicative methodology.....	7
1.5.	EXPECTED RESULTS AND PERFORMANCE INDICATORS	21
1.5.1.	Expected results	21
1.5.2.	Performance indicators	21
1.6.	INPUT BY EASME.....	21
1.7.	STARTING DATE OF THE CONTRACT AND DURATION	21
1.8.	PLACE OF PERFORMANCE.....	22
1.9.	PLANNING AND DELIVERABLES	22
1.9.1.	Inception report.....	23
1.9.2.	Interim technical report	23
1.9.3.	Draft final technical report.....	23
1.9.4.	Final technical report.....	23
1.9.5.	Other Specific Deliverables	23
1.10.	PAYMENT TERMS	28
1.11.	CONFIDENTIALITY, DATA PROTECTION MATTERS AND PENALTY CLAUSES.....	28
2.	INFORMATION ON TENDERING.....	28
2.1.	ELIGIBILITY	28
2.2.	VOLUME OF THE MARKET	29
2.3.	LOTS	29
2.4.	VARIANTS.....	29
2.5.	TENDERS FROM CONSORTIA.....	29
2.6.	SUB-CONTRACTING	29
2.7.	COSTS	30
2.8.	CONTRACTUAL CONDITIONS	30
2.9.	FORM AND CONTENTS OF THE TENDERS.....	30
2.10.	SUBMISSION OF TENDERS	31
2.11.	STRUCTURE OF TENDERS.....	31

2.11.1.	Section 1 – Administrative proposal	31
2.11.2.	Section 2 – Technical proposal	32
2.11.3.	Section 3 - Financial offer	33
3.	EVALUATION AND AWARD OF THE CONTRACT	34
3.1.	EVALUATION STEPS	34
3.2.	EXCLUSION CRITERIA (ARTICLES 106, 107 OF THE FINANCIAL REGULATION)	34
3.3.	SELECTION CRITERIA	35
3.3.1.	Economic and financial capacity criteria and evidence	35
3.3.2.	Technical and professional capacity criteria and evidence.....	36
3.4.	AWARD CRITERIA	38
3.5.	INFORMATION TO TENDERERS ON THE FINAL EVALUATION	39
4.	ANNEXES.....	40

INVITATION TO TENDER N° EASME/COSME/2014/023

Supporting international cluster and business network cooperation through the further development of the European Cluster Collaboration Platform

1. TECHNICAL SPECIFICATIONS

1.1. INTRODUCTION

The Executive Agency for Small and Medium-sized Enterprises (henceforth "EASME")¹, acting under powers delegated by the European Commission, is launching this invitation to tender for supporting international cluster and business network cooperation through the further development of the European Cluster Collaboration Platform.

1.2. BACKGROUND INFORMATION AND CONTEXT

Brief background and purpose of the tender

In a globalised world, SMEs need to be able to confront increasing competition from developed and emerging economies and to plug into the new market opportunities these countries will provide. There is a direct link between internationalisation and increased performance of SMEs. International activities reinforce growth, enhance competitiveness and support the long-term sustainability of companies. SMEs need to find the right partners to develop and produce globally competitive products and services. This calls for new forms of international cooperation that are often difficult for SMEs to manage on their own.

Clusters can act as real "springboards" for SMEs to help them getting access to global value chains and develop long-term strategic partnerships. Cluster firms benefit from specialised business support services of cluster organisations, like international study visits, the organisation of partnering or "matchmaking" missions that facilitate finding new partners outside the own region for research and prototyping as well as for bringing products and services to the market. SMEs have to increasingly integrate themselves into global value chains that are also controlled and managed by foreign companies. The clustering of different competences along a value chain in a region remains an important element of competitive advantages but the successful participation in global value chains is another condition for economic success. Cluster organisations can help firms, and in particular SMEs, to find partners for cooperation internationally and therefore to raise their excellence and thus their overall competitiveness and innovation capacity.

This action will contribute to the creation of more globally competitive clusters in Europe ("world-class clusters") to facilitate the integration of their SME members into global value chains, which remains a top priority for European actions as highlighted in the Commission Communication 'For a European Industrial Renaissance'². This Communication identifies efforts

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

² COM(2014)14 Final (see <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014DC0014&from=EN>)

to increase the internationalisation of SMEs and their integration into global value chains as a particular priority and acknowledges the need to better exploit the potential of clusters to create favourable innovation ecosystems for mutually reinforcing groups of SMEs as a means of promoting growth and to facilitate the matchmaking of SMEs wishing to integrate into world-class clusters aiming for excellence and cross-European value chains.

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 enterprise (COSME) (2014-2020) and repealing Decision No 1639/2006/EC. More particularly, it is based on the Commission Implementing Decision concerning the adoption of the Work Programme for 2014 and the financing for the implementation of Programme for the Competitiveness of Enterprises and small and medium-sized enterprises (C(2014) 247 final of 22.1.2014) as revised on 22.07.2014 (C(2014) 4993 final 22.7.2014)³.

EU policies and initiatives taken on this action

This project shall be undertaken as part of the follow-up to the European Cluster Collaboration Platform⁴ (ECCP) that has been developed between 2009-2012 as a pilot action under the European Cluster Observatory⁵ and that has been maintained and further developed between 2012-2014 through an ad-hoc grant to promote European and international cluster cooperation for the benefit of SMEs. The ECCP consists of a web Platform with online tools that offer cluster organisations and their members the possibility to map their organisation, profile their activities, find partners and promote collaboration in a targeted manner within and beyond Europe. The ECCP currently counts over 950 registered cluster organisations and facilitates cooperation between cluster organisations not only within Europe but also with a number of international partners. To this end, the ECCP has signed Memoranda of Understanding (MoU) with partners in India, Japan, Brazil, South Korea, Tunisia, Morocco, Mexico and Chile. The ECCP is therefore a key instrument for promoting international cluster cooperation for the benefit of SMEs at EU level.

This project also builds upon the experience of previous CIP-funded actions organising cluster matchmaking events⁶. A number of specific matchmaking events have been organised through these actions to promote closer cluster cooperation with partners outside and within Europe in areas of mutual interest. The first international cluster matchmaking events were organised respectively in Japan in November 2012 in the field of clean technologies, in Brazil on biotech in September 2013 and India on resource efficiency in October 2013. Other cluster matchmaking events have also been organised in Europe in 2014 such as in Belgium, Italy and Spain notably with a view to fostering cross-sectoral cooperation between clusters and their members across Europe.

Finally, a cluster internationalisation action was launched under CIP in 2011 to encourage clusters in Europe to work concretely together and engage in true cooperation on international markets. As part of a pilot action, 6 European cluster consortia⁷ have worked together to develop joint international strategies in specific 3rd countries. This action contributed to the

³ See 2014 Work programme 2014 at http://ec.europa.eu/enterprise/initiatives/cosme/index_en.htm and 1st revision of 22.07.2014

<http://ec.europa.eu/DocsRoom/documents/5973/attachments/1/translations/en/renditions/native>

⁴ See at: http://ec.europa.eu/enterprise/initiatives/cluster/internationalisation/index_en.htm or www.clustercollaboration.eu

⁵ See at: http://ec.europa.eu/enterprise/initiatives/cluster/observatory/index_en.htm

⁶ Service Contracts N° 124//PP/ENT/CIP/11/C/N04C041 – Lead contractor: Fondation Sophia Antipolis and N° 246/PP/ENT/CIP/13/C/N04C032 – see at: <http://www.clustercollaboration.eu/match-making-missions>

⁷ See at: <http://www.clustercollaboration.eu/european-strategy>

design, testing and validation of this new approach in different business sectors, notably cleantech, life-sciences, renewables, sports goods, facilities & events, advanced textiles, and food and related biotech sectors. The objective of the present project is to further promote such pilot actions and the resulting European Strategic Cluster Partnerships that will be established under COSME to lead international cluster cooperation in fields of strategic interest notably in support of emerging industries⁸. These partnerships shall encourage clusters from Europe to intensify cluster collaboration across borders and sectoral boundaries and to develop and implement joint strategies towards third countries in new areas.

1.3. GENERAL AND SPECIFIC OBJECTIVES

EASME wishes to enter into a service contract.

The present call for tenders aims to select a service provider to contribute to support a favourable environment for international cluster cooperation facilitating the integration of European SMEs in global value chains through the further development of the European Cluster Collaboration Platform (ECCP), the organisation of cluster matchmaking events within and beyond Europe, and the support for cluster cooperation with strategic global partners.

This project shall contribute to the establishment of a stable and inclusive **European online Platform** that will provide support to cluster cooperation within and beyond Europe on a sustainable basis, thus creating a level playing field for cluster organisations and their SME members from COSME participating countries. With this platform, cluster organisations should find it easier to enter into transnational collaboration and to identify partners with complementary assets and capabilities across countries and sectors. This would also contribute to efforts to make European cluster organisations and their members more visible at international level and accelerate the development and implementation of closer transnational cluster cooperation worldwide. This Platform shall form the nucleus of the European cluster community on which future activities in support of international cluster cooperation shall be built. To meet these expectations, the Platform would need to be continuously upgraded and updated to remain an attractive Platform that is open to all cluster organisations and their members.

This project shall also contribute to support the preparation, organisation and close follow-up of **cluster matchmaking events** offering cooperation opportunities for European cluster organisations with partners within and beyond Europe. These events will contribute to preparing the ground for practical cluster cooperation across borders and make a more strategic use of transnational cluster cooperation by promoting globally competitive clusters from Europe in areas of strategic interest. On the one hand, this shall contribute to helping SMEs in clusters find easier access to **global value chains** and engage in long-term **cooperation with strategic partners in third countries**. On the other hand, it shall also encourage SMEs in clusters that are less involved in transnational **cooperation in Europe** to better engage in cross-sectoral cooperation and integrate into cross-European value chains. This has been demonstrated by the successful participation of cluster representatives from several central and eastern European regions in the cluster-to-cluster matchmaking sessions of the Missions for Growth of the Enterprise and Industry Directorate-General organised in 2014 in several European countries⁹ (i.e. Belgium, Italy and Spain).

⁸ See the "Cluster Go International" action (http://ec.europa.eu/enterprise/initiatives/cluster/internationalisation/index_en.htm) to be launched through a call for proposals as part of the Cluster internationalisation programme for SMEs under the COSME Work Programme 2014-2015 (http://ec.europa.eu/enterprise/initiatives/cosme/index_en.htm) and see on p.36-37 of the 1st revision of 22.07.2014

⁹ See at: <http://www.clustercollaboration.eu/match-making-missions>

This action shall also allow the continuation and further development of cooperation activities established with international partners. This action will notably contribute to **supporting policy dialogues** and implementing the collaboration agreements signed or envisaged to be signed with a number of strategic global partners by the Directorate-General for Enterprise and Industry of the European Commission or by the European Cluster Collaboration Platform (ECCP) to facilitate cooperation with clusters in third countries. Such Memoranda of Understanding (MoU) have previously been signed by the ECCP with partners in India, Japan, Brazil, Korea, Tunisia, Morocco, Mexico and Chile and new collaboration agreements may be envisaged in this or other forms with other third countries, such as the US and China.

1.4. SCOPE AND DESCRIPTION OF TASKS

There are three specific work packages to be performed by the successful tenderer. The work packages are detailed below. The implementation and the results of the three work packages are interrelated but can be separated. The total project duration is 24 months and the contract may be extended for 24 additional months only for the tasks of the Work Packages 1 and 3), depending on the future needs and on the budget availability.

The first Work Package will focus on the development and maintenance of a web-based Platform facilitating the networking and community building between cluster organisations within and beyond Europe. The second Work Package will support the organisation of transnational cluster matchmaking events. Finally, under the third Work Package will focus on the facilitation of international cluster cooperation with strategic global partners.

1.4.1. Geographical scope

The services to be delivered will cover all the countries participating in the COSME programme¹⁰.

1.4.2. Indicative methodology

➤ **WORK PACKAGE 1 – Development and maintenance of a web-based European Cluster Collaboration Platform (ECCP) and facilitation of networking and community building between cluster organisations within and beyond Europe**

○ ***Task 1 – Development of the web-based European Cluster Collaboration Platform***

The first task of the first work package is dedicated to the development of the new web-based European Cluster Collaboration Platform, which shall take the form of a user-friendly online Platform facilitating transnational cluster cooperation within and beyond Europe building upon the existing web Platform¹¹ that is managed by the partners of the consortium currently responsible for the ECCP project. A migration of the content and data from the current to the new platform shall be carried out by the successful tenderer who will continue the work to develop a stable platform for cluster cooperation in Europe.

The contractor will be responsible for the design, development and infrastructure hosting (hardware, software) of the web Platform. In particular, the contractor will be responsible for determining the necessary features and functionalities and developing its components and contents to be built and integrated into a dedicated web application. The website shall be

¹⁰ See at: http://ec.europa.eu/enterprise/initiatives/cosme/index_en.htm or <http://ec.europa.eu/DocsRoom/documents/7001>

¹¹ See at: www.clustercollaboration.eu or http://ec.europa.eu/enterprise/initiatives/cluster/internationalisation/index_en.htm

external to those of the European Commission and may not be promoted as an official EC website nor use the EC visual identity. The European Commission will be the owner of the new web Platform.

The contractor is expected to develop tailored online tools facilitating transnational cluster cooperation in line with current best industry standards for the provision of such services and to assure its long-term compatibility in view of changing technologies in order to ensure a responsive and user-friendly service. The contractor must use open source and web content management system (CMS) compatible with Drupal 7.

A web-master (together with the back-up person, being able to update the website during one working day), a web-content manager and a web-designer shall be appointed by the contractor.

Ease of use, intuitive execution of functions with a minimum of “clicks” is crucial. The system shall facilitate dynamic content provision and communication through high user-friendliness. An immediately comprehensible thematic structure and navigation system are essential; users shall be able to navigate easily between the different sections.

The following minimum functionalities are proposed as reference points:

- User-friendly interface in English language including various support services such as print, mail, help, contact etc.;
- Clear, simple and intuitive navigation system;
- Design the website in responsive way (easy reading and navigation with a minimum of resizing, panning and scrolling across a wide range of devices, i.e. smartphones and tablet PCs) and cross-browser compatible (at least for the most popular, i.e. Google Chrome, Internet Explorer, Mozilla);
- Precise search engine to index and provide access to resources (allowing search of the portal and database of indicators for key words, phrases, etc.);
- Possible restrictive access to certain sections reserved for a specific category of users;
- Regularly report user improvement suggestions to EASME;
- Ensure accuracy, consistency and integrity of data at all times;
- Ensure that the current domain name be kept valid for 24 months after the contract expiry;
- Provide user support via electronic mail in the English language. Users shall receive a reply within 24 hours, except Saturdays, Sundays and during holidays. User suggestions for improvements shall be registered separately and regular user surveys shall be conducted to identify and address such needs;
- Provide appropriate web analytics on the web usage, traffic per geographical origin, sections most read, emerging needs, regular user improvement suggestions and the networking and community building activities undertaken;
- Undergo stress testing to ensure that the performance of the website is acceptable;
- Undergo vulnerability assessment to ensure that standard securities measures have been applied;
- Publication of personal data has to be notified in accordance with Data Protection regulations.

The contractor shall consider the possibility of establishing two-directional linkages with existing social media platforms like relevant groups on LinkedIn and twitter account to promote and disseminate information on the activities, results and events, but also to relay relevant messages from the groups on the Platform.

All substantial changes are subject to approval by EASME and properly tested (verified) by the contractor before being put into production. EASME shall have the opportunity to comment on intermediate steps (such as user interface mock-ups, design, functionality etc.) throughout the development process. Data in the web portal that is subject to intellectual property rights and personal data protection shall be handled.

By the end of the contract, a hand-over file must be prepared and assistance provided in order to ensure a smooth transition of the consolidated ECCP web Platform to another contractor, at least, the following artefacts are to be delivered:

- Functional/feature description document (a description of what the system does, from the technical point of view. It's typically a table where all technical features appear with their technical description and technical components related to);
- Architecture overview and inventory of software;
- Source code/files (typically this includes project files, source code files, configuration files, scripts, installation scripts, etc);
- Application data;
- System security plan (a description of access rights and permissions, roles & responsibilities);
- Administration/maintenance manual.

The following tasks describe the features to be integrated to the ECCP web Platform as set out under task 1 above:

- ***Task 2 – Development of a database mapping and profiling cluster organisations***

The Platform shall be developed as a tool to facilitate networking and community building between cluster organisations and cluster firms within and outside Europe and to support the profiling of European clusters on international markets with a view to helping European clusters be more strategically visible and open for cooperation worldwide.

To this end, the contractor shall develop a database of cluster organisations that include the following requirements:

1. Provision of a mapping of cluster organisations from Europe and from priority third countries (as identified in Work package 3) with information on cluster organisations (name of the organisation and cluster manager, main sector and thematic field, postal and web address, telephone, email, etc.) through a clickable map allowing search by sectors/thematic fields such as advanced manufacturing and others and by geographic locations/regions using the same mapping software/standard as the one used under the European Cluster Observatory to allow full synergies between them (targets: 1.000 cluster organisation from Europe and 350 organisations from third countries). Information shall be collected from different sources including from the current ECCP website, the European Cluster Observatory database, international partners from third countries notably based on existing cluster mapping websites, etc. The mapping of cluster organisations from COSME

participating countries will be based upon the complete profiles registered on the profiling tool to be developed (see point below);

2. Provision of a profiling tool helping cluster organisations from COSME participating countries to profile and brand their activities and those of their members. This profiling tool should present cluster organisations with structured information such as cluster mission, members, sector and thematic field, main activity areas, thematic competences, legal form, interest for cooperation, management quality labels, type of business support services provided to cluster members, etc. Cluster organisations from COSME participating countries will be invited to complete and/or review their profile, notably based on the 950 profiles currently registered on the existing ECCP website. Cluster organisations from third countries will also be given the possibility to register their profiles on the Platform on a voluntary basis.

○ **Task 3 – Development of other networking and community building tools**

The Platform shall develop other online tools supporting the networking and community building between cluster organisations including:

1. The provision of a dynamic and user-friendly partner search facility enabling cluster organisations to:
 - post their offers and requests for cooperation, expertise, partners or support for the benefit of their members;
 - post their interest in participating in cluster visits;
 - match functions between cluster organisations and specific competences such as designers, creative directors, marketing and trade promotion experts.
2. The provision of a dynamic and user-friendly matchmaking tool facilitating the organisation of cluster-to-cluster matchmaking events (see also WP2). The use of an existing tool can be envisaged;
3. The provision and organisation of interactive consultation and feedback mechanisms to conduct surveys of relevant stakeholders;
4. The facilitation of webinar sessions allowing online networking and possible pre-matching meetings prior to cluster matchmaking events;
5. The provision of an information service about new calls or expressions of interest relating to projects and initiatives promoting cluster cooperation within and beyond Europe;
6. A news service and event calendar of relevance for cluster organisations from Europe and worldwide with specific emphasis on priority third markets. Specific news articles shall be drafted and edited to promote activities of any relevant initiatives or projects featured on the Platform;
7. A weekly electronic news round-up with brief abstract of key information (twitter style) should be prepared and sent through an emailing list established on the basis of the cluster organisation database developed under task 2 above;
8. The provision of promotional material including European Cluster Collaboration Platform roll-ups and promotion leaflets.

○ **Task 4 – Promoting European Strategic Cluster Partnerships**

This action shall be instrumental not only to promote bilateral cooperation between cluster organisations within and beyond Europe, but also to further encourage clusters in Europe to work concretely together to establish 'European Strategic Cluster Partnerships' to target international markets more efficiently jointly.

To this end, the contractor is expected to proactively promote and leverage the activities of previous, on-going and forthcoming European Strategic Cluster Partnerships, including those

- set up as part of the 6 pilot 'European Cluster Consortia' launched in 2011 and 2012 to develop joint internationalisation strategies¹²;
- established as part of a call for expression of interest launched by the European Cluster Collaboration Platform in March 2013¹³;
- to be established as part of the Cluster Internationalisation Programme for SMEs under COSME (2014-2020), including funded and non-funded projects;

The Contractor shall proactively collect the relevant information and develop dedicated web pages profiling each European Strategic Cluster Partnership in close cooperation with relevant project coordinators of past, ongoing and future initiatives to feature in a structured manner their objectives, cooperation activities, results, news, events, missions, etc. and allowing for advanced search possibilities on cooperation notably by thematic area and target country.

○ **Task 5 – Promoting Cluster Matchmaking Events**

As part of Work Package 2, specific cluster matchmaking events will be organised to support cluster organisations and their SME members in their efforts to access global value chains and develop strategic partnerships and business cooperation with European and international partners.

The Contractor shall proactively collect the relevant information and develop user-friendly dedicated web pages supporting the preparation and promotion of each cluster matchmaking event to be organised in close cooperation with relevant parties involved, including with the contractors responsible for the 'Low Carbon Business Action in Middle Income Countries' under the EU's Partnership Instrument¹⁴. Pilot actions with Brazil and Mexico are launched under the 2014 Annual Action Programme and more may be launched with other countries in the following years. This will involve:

- the publication of calls for expression of interest,
- the provision of an online tool for organising cluster-to-cluster matchmaking meetings,
- the facilitation of webinars session allowing a pre-matching of participants;
- the promotion of the event results using pictures and videos taken at the event.

○ **Task 6 – Supporting international cluster cooperation in strategic Third markets**

As part of Work Package 3, international cluster cooperation will be supported with a number of strategic third countries which shall be featured prominently on the Platform.

¹² 6 pilot projects "Promoting international cluster activities in the CIP participating countries" (ending 30/10/2014) see at: <http://www.clustercollaboration.eu/international-projects>

¹³ See at: <https://www.clustercollaboration.eu/escps>

¹⁴ See at: http://ec.europa.eu/dgs/fpi/what-we-do/partnership_instrument_en.htm

The Contractor shall proactively collect the relevant information and develop user-friendly dedicated web pages profiling the international cooperation established with each strategic third country in close cooperation with relevant partners in the third country. This shall allow for advanced search possibilities on cooperation notably by areas of interest, missions, results, potential and success cases for cluster cooperation, etc. It should build upon structured information, including:

- Cooperation agreements
- Mapping of cluster organisations in 3rd countries
- Cluster support programmes and initiatives
- Events, News, calls,
- Key documents, other material

Specific efforts are expected to be made to include information on cluster organisations from these strategic third countries in the mapping and profiling database to be developed under Task 2 above.

○ **Task 7 – Promoting the ECCP as a European hub supporting international cluster cooperation**

The purpose of this task is to promote the ECCP as a hub for European actions in support of cluster internationalisation for the benefit of European SMEs by proactively hosting and promoting all relevant online communication activities developed by the different actions launched by the Commission services in support of this objective including:

1. the specific training materials on SME internationalisation for cluster managers and good practice exchanges developed by the European Foundation for Cluster Excellence (EFCE)¹⁵ and the benchmarking data on cluster services notably promoting SME internationalisation collected by the European Secretariat for Cluster Analysis (ESCA)¹⁶;
2. the specific internationalisation support activities promoted under the Enterprise Europe Network (EEN) portal¹⁷ and its local contact points in third countries¹⁸ supporting market access in third markets for European SMEs, the new European Commission portal on SME internationalisation¹⁹ and its market access database²⁰ providing market access information for individual growth markets, the EU business centres²¹ helping EU SMEs and clusters to enter third-country markets (e.g. in China²², India²³ and more are envisaged to be established in other countries) and the EU-Japan Industrial Cooperation Centre²⁴, as well as the IPR Helpdesk in China²⁵ delivering a targeted advice on IPR issues to EU SMEs and clusters;

¹⁵ See at: http://ec.europa.eu/enterprise/initiatives/cluster/excellence/index_en.htm and <http://www.clustercompetitiveness.org/>

¹⁶ See at: http://ec.europa.eu/enterprise/initiatives/cluster/excellence/index_en.htm and <http://www.cluster-analysis.org/>

¹⁷ See at: http://ec.europa.eu/enterprise/policies/sme/market-access/enterprise-europe-network/index_en.htm and <http://een.ec.europa.eu/>

¹⁸ See at: <http://een.ec.europa.eu/services/going-international> and <http://een.ec.europa.eu/about/branches>

¹⁹ See at: http://ec.europa.eu/enterprise/policies/sme/market-access/internationalisation/index_en.htm and <https://webgate.ec.europa.eu/smeip/>

²⁰ See at: <http://madb.europa.eu/madb/indexPubli.htm>

²¹ See at: http://ec.europa.eu/enterprise/policies/sme/market-access/internationalisation/index_en.htm and

²² See at: <http://www.eusmecentre.org.cn/>

²³ See at: <http://ebtc.eu/> and

http://eeas.europa.eu/delegations/india/eu_india/trade_relation/doing_business_in_india/index_en.htm

²⁴ See at: <http://www.eu-japan.eu/global/> and

http://ec.europa.eu/enterprise/policies/international/cooperating-governments/japan/index_en.htm

²⁵ See at: <http://www.china-iprhelpdesk.eu/>

3. the activities developed through the 'Low Carbon Business Action in Middle Income Countries' under the EU's Partnership Instrument²⁶. Pilot actions with Brazil and Mexico are launched under the 2014 Annual Action Programme and more may be launched with other countries in the following years.
4. other projects promoting international cluster cooperation and SME internationalisation through clusters such as
 - the past preparatory action mandated by the European Parliament on "Euromed innovative entrepreneurs for change" fostering cooperation with 4 south Mediterranean countries (ie. Egypt, Lebanon, Morocco and Tunisia) as well as follow-up actions developed by the Development and Cooperation Directorate-General;
 - relevant international cooperation activities promoted by the Directorate General for Regional and Urban Policy including cluster cooperation initiatives funded under the Structural and Investments Funds territorial programmes, contributing to implement smart specialisations strategies of EU regions.

➤ **WORK PACKAGE 2 – Organisation of cluster matchmaking events**

This work package will support the organisation of 3 types of cluster matchmaking events:

- Four 'Outgoing international cluster matchmaking events' organised outside Europe, bringing together a delegation of cluster representatives from COSME participating countries in a specific strategic third market to promote business opportunities and initiate partnerships with international partners;
- Three 'Incoming international cluster matchmaking events' organised in Europe, bringing together cluster representatives from COSME participating countries in a major European business event to promote business opportunities and initiate partnerships with cluster delegations from strategic third countries;
- Three 'European cluster matchmaking events' organised in Europe, bringing together cluster representatives from COSME participating countries in different sectors to promote cross-sectoral cooperation and contribute to the emergence of new industrial value chains across Europe.

The specific objectives to be carried out under this work package are:

- To develop a roadmap for the organisation of a total of 10 events and identify, taking into account of the activities carried out in the Work Package 3, where these events shall take place, which organisations will host these events and what their thematic focus shall be. The contractor is expected to make recommendations to EASME and the European Commission services, who will decide on the place, host organisation and focus of each event;
- To prepare and support a delegation of clusters from COSME participating countries in the specific area identified with a view to establishing concrete cooperation/partnerships with international or European partners;
- To complete the planning, preparation and co-ordination of the events and the necessary preparatory documentation, communication and reporting/follow-up activities.

²⁶ See at: http://ec.europa.eu/dgs/fpi/what-we-do/partnership_instrument_en.htm

For the purposes of this service contract, the tasks to be performed are detailed as follows:

○ **Task 1 – Planning of the ten matchmaking missions**

The purpose of this task is to define the place, thematic focus and the main organisational modalities of the 10 events in collaboration with the international partners having signed a cluster cooperation agreement with the ECCP, the European Commission services or EASME and to develop a work plan for the organisation and evaluation of each event.

This involves the following work:

1. Liaise with the contractor of the European Cluster Observatory to assess the potential for international cluster cooperation with specific strategic third markets in areas of mutual interest. This work could also include the identification of interests of the 'European Strategic Cluster Partnerships' promoted under Work Package 1 to take part in such events and to contribute to identifying specific thematic fields presenting strong potential for cluster cooperation.
2. Identify the places where the events will take place as well as the organisations willing to host the events and make recommendations to EASME and European Commission services who will decide the place and host organisation for each event. In particular, these events should contribute to support the Missions for Growth to be organised by Enterprise and Industry Directorate-General within and beyond Europe. As regards the international (outgoing and incoming) events, they should be organised in collaboration with partners in third countries building upon the cluster cooperation agreements signed by the current European Cluster Collaboration Platform (ECCP) or to be signed by the Enterprise and Industry Directorate-General of the European Commission (to be confirmed at a later stage). The contractor is expected to establish a work plan including dates and thematic focus for each event in agreement with the host organisations as regards all relevant implementation modalities. Each mission will have a duration of two to three days with about 60 participants. It should be noted that the Contractor will only be allowed to travel to the host country to undertake preparatory work once a specific event is fully confirmed.
3. Describe the general approach and prepare an overall blueprint (methodological report) on how to organise and run each event and collect valuable feedback from all parties concerned in the most efficient way. The contractor is expected to adapt, further improve and build upon tools and knowledge from various sources including from the previous CIP-funded actions organising similar type of international cluster matchmaking missions²⁷.
4. Develop a work plan to measure the success and impact of the action including a methodology to report back on the outcomes of each mission. This should integrate and build upon indicators such as
 - Number of European cluster representatives attending the matchmaking missions;
 - Level and quality of preparation and reporting documentation;
 - Degree of satisfaction with the mission content, organisation and results as measured through post-mission evaluation surveys of participants, including the verified degree of fitness-for-the purpose of the mission;

²⁷ Service Contracts N° 124//PP/ENT/CIP/11/C/N04C041 – Lead contractor: Fondation Sophia Antipolis and N° 246/PP/ENT/CIP/13/C/N04C032 – see at: <http://www.clustercollaboration.eu/match-making-missions>

- Number of actual cooperation agreements / partnerships initiated and/or established through the action.
 - **Task 2 – Preparation of the ten matchmaking missions**

The purpose of this task is to conduct the complete preparation of each event, including the mobilisation and selection of relevant cluster organisations from COSME participating countries and liaison with the host organisation(s) on practical arrangements.

This includes the following work:

1. Liaise with the host organisation(s), which can be either one or more cooperation partners in a third country or a cluster, network or local public organisation in Europe, to agree on all practical organisational aspects such as scope, programme, timing, venue and sharing of costs. As regards events organised in third countries, the host organisation shall, in particular, cover the costs related to the event premises but the contractor could also contribute to cover the costs of premises in third countries when necessary catering and technical equipment (see "reimbursables" under section 2.11.3), including the interpretation (staff and equipment) into the local language(s) for plenary sessions, as each event will be organised in English. Costs relating to interpretation for B2B/C2C meetings shall be covered under this service contract. As regards events organised in Europe, the costs related to event premises and technical equipment could be covered under this service contract.
2. Perform the complete preparation and coordination of the event, including drafting of the programme; identification, invitation and briefing of invited experts to support the programme as speakers, moderators or rapporteurs; design and production of the mission communication material (incl. documentation, flyers and posters presenting each member organisation of the delegation) in English and the local language where relevant. All organisational costs (e.g. secretarial services, management of registrations, distribution of documentation, etc.) must be covered under this service contract. No participation fees may be charged.
3. Proactively promote information related to the action and in support of each specific event on the ECCP web Platform through timely publication of news articles, flash reports, mission documentation, to raise awareness and mobilise relevant cluster organisations in COSME participating countries, and to communicate about the results and follow-up of the action. Web communication should also be envisaged through other relevant web portals such as the Enterprise Europe Network portal and any other EU related platforms, initiatives and projects as appropriate.
4. Prepare and launch open consultations for expressions of interest to be published on the ECCP web-Platform and other related web portals to identify relevant cluster representatives from COSME participating countries to participate in these events.

The consultations for expressions of interest shall enable selection of those cluster and network organisations from COSME participating countries that promise the highest impact of the matchmaking events to be organised. With respect to the eligibility of organisations, the definition given in section 5.8 of the "*Community Framework for State Aid for Research and Development and Innovation*" and its revised framework adopted on 27/06/2014²⁸ should be applied. For the purpose of this action, each cluster and network organisation has

²⁸ See at: <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:C:2006:323:0001:0026:EN:PDF> and [http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014XC0627\(01\)&from=EN](http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52014XC0627(01)&from=EN)

to be involved in offering or channelling cluster and network support services to businesses and should be identified on the basis of a legal identity.

Cluster and network organisations participating in the consultations for expressions of interest shall be registered on the European Cluster Collaboration Platform with a complete profile. The submission form should also include a detailed description of the interest in collaboration, potential international partners and expected outcome and impact of participation in such missions.

5. Liaise with the host organisations in a third country to coordinate efforts in mobilising clusters from this third country to participate in the international matchmaking events, organised in Europe or in a third country. The ECCP web Platform shall be instrumental in facilitating the participation and registration of clusters from third countries.
6. Select from amongst the applying organisations a European delegation composed of up to 18 cluster representatives from countries participating in the COSME programme²⁹ for events organised in third countries and up to 25 cluster representatives from COSME participating countries for events organised in Europe. The selection will include direct consultations with, and surveys of the applying cluster representatives as appropriate. The decision on the choice of the delegation representatives will be made by EASME and the European Commission services.
7. Provide the event participants with information prior to the mission giving an overview of the key market trends in the specific business area in the host country, a mapping of relevant clusters in the host country, information on company members of these clusters and existing cooperation initiatives with international partners. The ECCP shall be instrumental in compiling some of this information.
8. Organise, prior the event, virtual pre-matching exchanges between selected clusters from COSME participating countries and the third country through webinars, Skype, telephone and emails to share profiles and partnering interests with a view to pre-assessing scope for cooperation and facilitate the organisation of cluster-to-cluster (C2C) meetings at the matchmaking events.
9. Select and invite through a subcontract relevant experts on the specific thematic focus of the matchmaking event to prepare an input paper that shall be presented in a plenary session to set the scene and to moderate discussions on the potential for promoting international cluster cooperation with the targeted host country and in the pre-defined thematic focus. The paper should elaborate, in particular, on success factors, potential barriers, and possible showcases for establishing and reinforcing cluster cooperation between COSME participating countries and host country clusters. All costs related to invited experts will follow the reimbursement rules as described in section 2.11.3 Financial proposal.
10. Facilitate the travel arrangements for the European delegation of cluster representatives. Cluster representatives could include SME members when the events are not organised in liaison with the services of the Enterprise Europe Network as part of a mission for Growth promoted by the Enterprise and Industry Directorate-General. In such case, each cluster organisation will have the possibility to pre-invite one cluster SME member to be part of the delegation based on the interest and potential to establish collaboration agreements/partnerships as an outcome of these matchmaking missions. Other SME

²⁹ See at: http://ec.europa.eu/enterprise/policies/international/competitiveness-innovation/index_en.htm

members could join the mission at their own costs. All costs related to European delegates will follow the reimbursement rules as described in section 2.11.3 Financial proposal.

All costs (e.g. travel, hotel) related to the participants from third countries are not covered under this service contract. The identification of these participants shall take into account the collaboration interests expressed by the European delegation with a view to maximising matchmaking opportunities.

In case that the number of 10 events to be organised under this contract is not achieved, it shall be noted that EASME reserves the right to reduce the budget proportionally of the contract.

○ **Task 3 – Facilitation of the ten matchmaking missions and follow-up activities**

The purpose of this task is to conduct the complete facilitation and co-ordination of the event on-the-spot and the necessary, communication and reporting/follow-up activities.

This includes the following work:

1. Liaise and coordinate proactively with the local host organisations for all organisational aspects of each mission and agree on the respective roles and responsibilities, including sharing of costs, between the host organisation and the contractor in preparing and conducting the event, including the logistical support to the European delegation of cluster representatives and invited experts (e.g. bus transfers, pick-up services);
2. Liaise also with the EU business centres³⁰ where relevant (i.e. in China³¹, India³² and more are envisaged to be established in other countries), the EU-Japan Industrial Cooperation Centre³³, the Enterprise Europe Network (EEN)³⁴ local contact points in third countries³⁵ to help mobilising clusters and SME members from third countries to participate proactively to the matchmaking meetings and cooperation seminar;
3. Prepare, print, send and display all relevant communication material in English and local languages, where relevant, in support of plenary sessions including a description of the objectives of the mission, mission posters, banners, booklet with detailed information on the participating clusters with their partnering requests in the targeted country.
4. Facilitate the matchmaking events. Each event could be structured in 4 parts:
 - Preparatory lectures / coaching sessions, cluster and/or company visits;
 - Cluster cooperation seminars introducing the delegation of cluster representatives and discussing trends and opportunities for reinforcing transnational cluster cooperation within or beyond Europe in the thematic area;
 - Cluster-to-cluster (C2C) meetings, and B2B meetings where relevant, should be organised ideally at the occasion of major international fair to discuss potential for partnering and signing cooperation agreement building upon the initial exchanges of the pre-matching session. A minimum of 5 meetings should be pre-organised and secured for each participating cluster representative;

³⁰ See at: http://ec.europa.eu/enterprise/policies/sme/market-access/internationalisation/index_en.htm and

³¹ See at: <http://www.eusmecentre.org.cn/>

³² See at: http://eeas.europa.eu/delegations/india/eu_india/trade_relation/doing_business_in_india/index_en.htm

³³ See at: <http://www.eu-japan.eu/global/> and

http://ec.europa.eu/enterprise/policies/international/cooperating-governments/japan/index_en.htm

³⁴ See at: http://ec.europa.eu/enterprise/policies/sme/market-access/enterprise-europe-network/index_en.htm and <http://een.ec.europa.eu/>

³⁵ See at: <http://een.ec.europa.eu/services/going-international> and <http://een.ec.europa.eu/about/branches>

- Debriefing sessions.
- 5. Follow-up closely the results of each event immediately after the mission (i.e. at the debriefing session) and through surveys including one immediately after the event, a second three months later and another one by the end of the action. The contractor is also expected to liaise with the EU business centres³⁶ where relevant (i.e. in China³⁷, India³⁸ and more are envisaged to be established in other countries), the EU-Japan Industrial Cooperation Centre³⁹ as well as the Enterprise Europe Network (EEN)⁴⁰ local contact points in third countries⁴¹ to help EU cluster organisations and SME members to follow-up their cooperation interest identified at the event and facilitate their access to third-country markets;
- 6. Produce a proceedings report that documents these results and conclusions on collaboration outcomes for on-line publication within three months following each matchmaking mission. The objective of these missions is to initiate concrete cooperation with international or European partners and good results would be to have negotiations started or cooperation agreements signed for 30 % of the mission's participants by the end of the action. The proceeding report should include an assessment and recommendations on the specific partnerships potential to be followed-up. The results should be promoted through specific news articles to be drafted and edited using pictures and/or videos made at each event. All event-related material is subject to approval by the EASME and should be published on the ECCP web Platform as soon as it is approved for publication.
- 7. Produce a Final report section assessing success factors, barriers and outcomes of the overall matchmaking process implemented throughout these twelve events. The performance of the action shall be assessed based on indicators relating to the timeliness and quality of the events organisation, the reports delivered, the communication material produced and the feedback from participants collected. It should also include recommendations on the follow-up of the agreements or partnerships initiated amongst the different event participants and draw lessons towards a scale-up of this process at subsequent phases.

➤ **WORK PACKAGE 3 – Facilitation of international cluster cooperation with strategic global partners**

This work package will contribute to facilitate the promotion of international cluster cooperation with 10 strategic third countries.

- ***Task 1 – Development of a knowledge base of cluster-related information on 10 strategic third countries***

The purpose of this task is to collect and select all relevant cluster-related information on 10 strategic third markets with a view to help identifying the potential and opportunities for promoting international cluster cooperation for the benefits of European SME members.

This includes the following work:

³⁶ See at: http://ec.europa.eu/enterprise/policies/sme/market-access/internationalisation/index_en.htm and

³⁷ See at: <http://www.eusmecentre.org.cn/>

³⁸ See at: http://eeas.europa.eu/delegations/india/eu_india/trade_relation/doing_business_in_india/index_en.htm

³⁹ See at: <http://www.eu-japan.eu/global/> and

http://ec.europa.eu/enterprise/policies/international/cooperating-governments/japan/index_en.htm

⁴⁰ See at: http://ec.europa.eu/enterprise/policies/sme/market-access/enterprise-europe-network/index_en.htm and <http://een.ec.europa.eu/>

⁴¹ See at: <http://een.ec.europa.eu/services/going-international> and <http://een.ec.europa.eu/about/branches>

1. Identify strategic third countries presenting high potential for cluster cooperation for clusters in Europe that shall be covered under this work package and make recommendations for selecting 10 countries to EASME and the European Commission services. This work shall build upon the different Memoranda of Understanding (MoUs) signed between the ECCP and international partners⁴² in India, Japan, Brazil, South Korea, Tunisia, Morocco, Mexico and Chile as well as the plans for establishing cooperation arrangements by DG Enterprise and Industry with a number of strategic global partners, such as USA and China. This work should also consider the target countries of the new Partnership Instrument of the European External Action Service, countries involved in the European Neighbourhood Policy (ENP) as well as potential with regions such as Africa, ASEAN or Gulf countries⁴³.
2. Collect and update on a yearly basis relevant cluster related information in the 10 selected strategic third countries including markets trends, key research and industrial developments, cluster policies, strategies, programmes and initiatives and identify main priorities and strengths. This work should notably build upon the analysis of the European Cluster Observatory on cluster internationalisation and global megatrends. This work would require also liaising regularly with the international partners that have signed a cooperation agreement with the ECCP or the Commission services.
3. Identify actions of strategic third countries promoting international cluster cooperation and assess opportunities and interest for cooperation with clusters in Europe (eg. in terms of fields, research, technology or business objectives, countries, etc.)
4. Collect information on cluster organisations from strategic third countries to register them on the ECCP mapping tool. The contractor is expected to register minimum 350 cluster organisations from the 10 strategic third countries on the cluster organisation database to be developed under work package 1 by the end of the contract.
 - ***Task 2 – Support for establishing and implementing cooperation agreements with international partners***

The purpose of this task is to facilitate the establishment and implementation of cooperation arrangements to be signed between the European Commission's Enterprise and Industry Directorate-General (or potentially EASME) and international partners identified in the 10 strategic third countries selected under task 1 above.

This shall include the following work:

1. Support for the preparation of administrative cooperation arrangements on cluster cooperation with relevant partners in strategic third countries. This could include exploratory activities identifying the right interlocutor, department in a specific country and possible counterpart to the European Cluster Collaboration Platform (incl. cluster organisation mapping and register). These arrangements shall aim at facilitating linkages between clusters from Europe and third countries and exchange of good practices in fields of mutual interest in order to promote economic growth and job creation through increased trade, investment, research and innovation partnerships;
2. Liaise on a regular basis with the international partners to facilitate exchanges of information on clusters (initiatives, programmes, events, etc.) to be featured on the ECCP web Platform and to support the organisation of international cluster matchmaking events;

⁴² See at: <http://www.clustercollaboration.eu/>

⁴³ See Enterprise and Industry Directorate-General dialogues established with third countries at: http://ec.europa.eu/enterprise/policies/international/cooperating-governments/index_en.htm

3. Participate in events and conferences to collect information and promote the European Cluster Collaboration Platform and related cluster cooperation initiatives in the strategic third countries in agreement with EASME and the European Commission services;
4. Liaise with relevant EU business support centres, EEN partners and EU delegations in the 10 strategic third countries to promote activities and results of international cluster cooperation actions, including the international cluster matchmaking events organised under Work Package 2 and those developed by the European Strategic Cluster Partnerships.
 - **Task 3 – Support for policy discussions on promoting international cluster cooperation with international partners**

The purpose of this task is to provide and present analytical input and stakeholders' views to the policy discussions to be conducted between the European Commission's Enterprise and Industry Directorate-General services and the international partners from third countries having signed a cooperation arrangement.

This shall include the following work:

1. Conduct research and surveys identifying opportunities for international cluster cooperation with each strategic third market and identify priority areas to be promoted in the interest of European SME. The Contractor is expected to prepare on the basis of this analysis, 10 brief discussion papers on opportunities for international cluster cooperation with 10 strategic third countries. These papers should indicate the needs, potential preferences, conditions and success factors for transnational cooperation between European clusters and international partners in the third countries with specific emphasis on opportunities for promoting cross-sectoral cluster cooperation in emerging fields.

This could include:

- an overview of existing cooperation between cluster members from COSME participating countries and the third country in specific fields;
- examples of successful international cluster cooperation initiatives between cluster members from Europe and the third countries for the benefit of European SMEs;
- indications on how cluster managers support SMEs in developing their internationalisation strategy in these specific foreign markets.

This work shall build upon:

- results and success factors from the European Strategic Cluster Partnerships' activities supported under COSME and Low carbon business actions supported by the new Partnership Instrument of the European External Action Service;
 - the analysis of the European Cluster Observatory notably on cluster internationalisation and global megatrends.
2. Support the preparation of and participate in annual working group meetings organised between the European Commission services and international partners in view of presenting the discussion papers, including results of analyses and surveys, discussing the planning of matchmaking events and other relevant cluster cooperation initiatives.

1.5. EXPECTED RESULTS AND PERFORMANCE INDICATORS

1.5.1. Expected results

The Contractor is expected to develop and maintain a user-friendly web-based European Cluster Collaboration Platform with key features facilitating the networking and collaboration between cluster organisations within and beyond Europe. It shall also support the preparation, organisation and close follow-up of 10 cluster matchmaking events offering cooperation opportunities for European cluster organisations with partners within and beyond Europe. This action will also contribute to promote international cluster cooperation with 10 strategic global partners by supporting policy discussions and the implementation of cooperation arrangements signed at EU level with international partners. The contractor is also expected to demonstrate the effectiveness of this overall action in supporting European SMEs involved in clusters and shall collect feedback from SMEs on a regular basis to assess the direct and indirect impact of the initiatives carried out under this contract on the competitiveness of SMEs.

All the components, features, data and content of the European Cluster Collaboration Platform, will be the property of the European Commission, as well as all the source code produced by the contractor and all the accompanying technical documentation.

1.5.2. Performance indicators

The service contract will be assessed, as a minimum, against the following performance indicators:

- Number of cluster organisations and business networks from COSME participating and third countries registered on the European Cluster Collaboration Platform;
- Number of cluster organisations and business networks from different COSME participating countries having benefited from the supported actions;
- Number of partnership agreements resulting from the supported actions;
- Number of events (workshops/ matchmaking events/ working group meetings) organised
- Number of SMEs having directly or indirectly benefited from the supported actions, resulting in cooperation projects, as measured through a survey ;
- Increase in the percentage of the turnover from international activities, and employment in Europe, of the SMEs having benefited directly and indirectly from the supported actions.

Tenderers should also propose further performance indicators, which will be discussed and adjusted upon discussion with the Commission services.

Warning : for the preparation of the tender, the potential tenderers must however comply with the full details given in Section 1.4. and not restrict themselves to the general descriptions just given.

1.6. INPUT BY EASME

1.7. STARTING DATE OF THE CONTRACT AND DURATION

It is expected that the contract is signed approximately during the 1st quarter of 2015.

The contract shall enter into force on the date on which it is signed by the last contracting party. The duration of the tasks shall not exceed 24 months from that date. The execution of the tasks shall not start before the contract has been signed or before the specific date specified in the

contract. An extension of the contract for two additional years may be awarded for the tasks as described in Work packages 1 and 3. This extension will be agreed following the provisions of the draft services contract. To this end, a second offer should be submitted to cover the tasks in the Work packages 1 and 3 for this extended period. This will be taken into consideration for the award of the contract. Work will follow the timetable detailed below.

Amendments may be made to the contract only in exceptional cases where the amendment is considered by EASME to be necessary for the completion of the project and following the provisions of the draft contract.

EASME reserves the right to make use of a negotiated procedure without prior publication of a contract notice for additional contracts involving services similar to those assigned to the party awarded the initial contract by the same contracting authority. That procedure may be used only during the 18 months following conclusion of the original contract.

1.8. PLACE OF PERFORMANCE

The tasks are to be performed at the premises designated by the service provider, with the exception of the EASME or the European Commission's premises. A maximum of 5 co-ordination meetings with the EASME and/or the European Commission will be held in Brussels.

1.9. PLANNING AND DELIVERABLES

The service provider must provide the required reports and documents accompanying the requests for payments in accordance with the conditions of the standard service contract.

The contractor must ensure that all reports under the contract are clear, concise and operational. Each report (excluding the final version of the final report) must have an introductory page providing an overview and the orientation of the report. It must describe the progress of the work under the contract, including any deviations from the foreseen tasks and timetable and the underlying reasons. It must also specify the status of any findings/conclusions/recommendations (e.g. whether these are tentative or final) and note any problems encountered during the process.

All reports and documents must be drafted in professional/high-quality English and transmitted both in printed and electronic format compatible with Microsoft Word according to the indicative timetable specified below. The final report and the executive summary must be of publishable quality, provided also in the Adobe portable document format (pdf) and in 2 hard copies.

The EASME will comment on the documents submitted within the period indicated in the planning table below (Table2: Indicative timetable for meetings, actions/deliverables). If the contracting authority has not reacted within this period, the respective document or report shall be deemed to have been approved.

Should EASME consider the final report not acceptable, the service provider may be invited to amend it; in this case liquidated damages will be applied in accordance with Article II.12 of the contract. Should the contracting authority reject the final report, EASME may terminate the contract in accordance with Article II.14 of the contract.

1.9.1. Inception report

The inception report shall specify the detailed work programme and the planning of all the activities in order to complete the Work Packages listed in Section 1.4.2. It shall indicate and provide an overview of the web Platform to be developed including a sitemap, user interface mock-ups and the different functionalities to build in as well as the methodology describing overall how the matchmaking events (with possible dates and thematic focus for each event) and the promotion of international cooperation with strategic partners will be carried out (with pre-identified list of third countries and thematic focus). This report should obtain EASME's approval before proceeding to the operational phase.

1.9.2. Interim technical report

Three interim technical report shall be submitted at Month 6, 12 and 18. The interim reports shall describe the progress achieved and follow-up actions for all tasks specified above and raise any problems encountered with sufficient information to permit reorientation if appropriate. Each report shall give clear indications and detailed planning of the work to be carried out during the rest of the contract period. The interim technical report shall report on the different performance indicators (as indicated in section 1.5.2) where relevant and include appropriate web analytics to inform about the web usage, traffic per geographical origin, sections most read, emerging needs, regular user improvement suggestions and the networking and community building activities undertaken. The intermediate reports shall not exceed 40 pages each, annexes excluded.

1.9.3. Draft final technical report

The draft final report shall follow the structure of the final report as agreed and include all the elements specified in sections 1.4.2 (Indicative methodology) and 1.5 (Expected results). It shall cover the entire work plan (its context, purpose, objectives and results) and include the draft findings, analysis, and factually based conclusions and recommendations in relation to the three Work Packages. It shall take account of the comments made earlier in the process. It shall not exceed 120 pages, annexes excluded.

1.9.4. Final technical report

Within the period indicated in the planning table below, the service provider will submit the final report in its definitive form, taking full account of the observations made by EASME on the draft final report, either by following them precisely or by explaining clearly why they have not done so. The final report shall be accompanied by an executive summary in English no longer than 10 pages.

1.9.5. Other Specific Deliverables

The following deliverables are expected under the Work Package 1:

- Provision of an overview of the web Platform to be developed including a sitemap, user interface mock-ups, design and the different functionalities to build in (month 1);
- Development of the public web-pages of the European Cluster Collaboration Platform – month 3, maintaining and managing of the pages – month 3-24;

- Provision of a mapping of cluster organisations, targeting 1.000 from Europe and 350 from priority third countries (see WP3, task 1), with an annual update of the database (months 4 and 14);
- Provision of a profiling tool helping cluster organisations from COSME participating countries to profile and brand their activities and those of their members (month 4);
- Provision of a dynamic and user-friendly partner search tool (month 4);
- Provision of a dynamic and user-friendly matchmaking tool facilitating the organisation of cluster-to-cluster matchmaking meetings (month 4);
- Provision of interactive consultation and feedback mechanisms to conduct surveys of relevant stakeholders (month 4) and organisation of 4 stakeholders consultations (months 6 – 24);
- Facilitation of up to 10 webinars sessions allowing online networking and possible pre-matching meetings prior to cluster matchmaking events (month 4 – 24);
- Provision of an information service about new calls and expression of interest;
- Provision of a news service and event calendar of relevance for cluster organisations from Europe and worldwide with specific emphasis on priority third markets. This include the provision of brief news articles to be drafted and edited to promote activities of any relevant initiatives or projects featured on the Platform (month 4 – 24);
- Provision of a e-mailing list (month 4) and a weekly European Cluster Collaboration Platform news round-up (month 5-24);
- Provision of promotion material including general European Cluster Collaboration Platform roll-ups and promotion leaflets (month 6);
- Provision of dedicated web-pages pro-actively promoting and leveraging the activities of European Strategic Cluster Partnerships (month 4-24);
- Provision of dedicated web-pages supporting the preparation and promotion of cluster matchmaking events (see WP2) (month 4-24);
- Provision of dedicated web-pages profiling the international cluster cooperation established with partners in 10 strategic third countries (see WP3) (month 4-24);
- Provision of dedicated web-pages and links promoting other European actions in support of cluster internationalisation for the benefits of European SMEs (eg. training material, EEN portal, Euromed actions, Low Carbon Business actions with middle income countries) (month 4-24).

The following deliverables are expected under Work Package 2

- Provision of a work plan to measure the results and impact of the action and to promote success cases (deliverable of task 1) (month 3);
- Open call texts for expressions of interest to select delegations of Cluster representatives from COSME participating countries (deliverable of task 2) at least four months before each mission. Approximate length: 6 pages;

- Event communication material (deliverable of task 2) prior to each mission presenting the delegation of cluster representatives participating in the event, the mission programme including a seminar agenda, practical information on logistical aspects and posters, large banner or other communication format profiling the cluster participants in the events.
- Input papers (deliverable of task 2) prior to each mission presenting the scope for promoting and/or reinforcing international cluster cooperation in the pre-defined strategic area. Approximate length: 10 pages;
- Proceedings reports (deliverable of task 3) documenting the different C2C meetings organised and possible follow-up actions, the discussions of each matchmaking mission and conclusions on collaboration outcomes for on-line publication within two months following each mission. Approximate length: 15-20 pages;
- News articles to promote the results of each event with a set of pictures and videos interviewing the participants (deliverable of task 3). Approximate length: 2-3 pages;
- Produce a Final report section (to be integrated in the Final Technical Report) assessing success factors, barriers and outcomes of the overall matchmaking process implemented throughout the twelve events.

The following deliverables are expected under Work Package 3

- Provision of a report identifying suitable strategic third countries presenting high potential for promoting cluster cooperation at European level. The report should explore and review the opportunities and potential with minimum 15 third countries with a view to select 10 strategic countries to engage in closer cooperation (month 3);
- Provision of 10 preparatory briefings collecting cluster related information on the selected 10 strategic third countries (one briefing per country) identifying main priorities and strengths as well as international cluster cooperation actions with a focus on interest for cooperation with European countries. This information shall contribute to support the preparation of administrative cluster cooperation arrangements between the European Commission and relevant partners in strategic third countries. This shall also include the identification of the right interlocutor and possible counterparts to the European Cluster Collaboration Platform – part of this information shall be presented on dedicated web-pages on the ECCP web Platform (month 3-24);
- Provision of information on cluster organisations from the 10 strategic third countries with a view to registering them on the ECCP mapping tool (target: minimum 350 cluster organisations from the 10 strategic third countries) (month 3-24);
- Provision of 10 discussion papers on opportunities for promoting international cluster cooperation with 10 strategic third countries identifying priority areas to be promoted in European SMEs' interest (one paper per country) (month 4 – 24);
- Preparation of up to 5 annual working group meetings to be organised in Europe between the European Commission services and international partners and presentation of the 10 discussion papers at working group meetings to be held in Europe or third countries (month 4 – 24).

The following outline work plan and indicative timetable are envisaged:

Table 1 - Indicative timetable for meetings, actions/deliverables

Timetable	Meetings	Actions/Deliverables
<i>Reference date</i>		Date of signature Submission of invoice for pre-financing.
<i>Month A (Ref. date + 30 days)</i>	Kick-off meeting	The project is launched at the meeting between the contractor and the steering group. The kick-off meeting will ensure that the contractor has a clear understanding of the terms of the contract and the objectives of the project.
<i>Month A + 2 weeks</i>		The contractor submits an inception report which will be discussed either in a teleconference or at the kick-off meeting ⁴⁴ .
<i>Month A + 30 days</i>		EASME acceptance
<i>Month B (ref. date + 6 months)</i>		The contractor submits a first interim report (without invoice).
<i>Month B + 2 weeks</i>	Coordination meeting 1	The first interim report will be discussed either in a teleconference or in a coordination meeting with the steering group ⁴⁵ .
<i>Month B + 30 days</i>		EASME acceptance
<i>Month C (ref. date + 12 months)</i>		The contractor submits the second interim report accompanied by the first interim invoice (including request for reimbursable expenses

⁴⁴ If required by EASME, the Contractor shall submit a new version of the report within 10 days after the meeting , addressing all comments of the steering group

⁴⁵ If required by EASME, the Contractor shall submit a new version of the report within 10 days after the meeting , addressing all comments of the steering group

		and supporting documents).
<i>Month C + 2 weeks</i>	Coordination meeting 2	The second interim report will be discussed in a coordination meeting with the steering group ⁴⁶ .
<i>Month C + 30 days</i>		EASME acceptance
<i>Month D (ref. date + 18 months)</i>		The contractor submits a third interim report (without invoice).
<i>Month D + 2 weeks</i>	Coordination meeting 3	The third interim report will be discussed either in a teleconference or in a coordination meeting with the steering group ⁴⁷ .
<i>Month D + 30 days</i>		EASME acceptance
<i>Month E (ref. date + 23 months)</i>		The contractor submits a draft final report
<i>Month E + 4 weeks</i>	Coordination meeting 4	The draft final report will be discussed in a teleconference or in a coordination meeting with the steering group. If required by EASME, the Contractor shall submit a new version of the report within 15 days after the meeting, addressing all comments from the steering group.
<i>Month E + 6 weeks</i>		The contractor submits the definitive version of the final report accompanied by the final invoice (including request for reimbursable expenses and supporting documents) and <ul style="list-style-type: none"> ➤ All source codes, components and accompanying technical

⁴⁶ If required by EASME, the Contractor shall submit a new version of the report within 10 days after the meeting , addressing all comments of the steering group

⁴⁷ If required by EASME, the Contractor shall submit a new version of the report within 10 days after the meeting , addressing all comments of the steering group

		documentation for the web-platform
<i>Month E + 10 weeks</i>		EASME acceptance: EASME approves the final report within 30 days from receipt.

1.10. PAYMENT TERMS

In drawing up their tenders, tenderers should take account of the provisions of the enclosed draft contract (annex 1) which include the "General terms and conditions applicable to service framework contracts".

Payments under the contract will be made as follows:

- Pre-financing (30%): receipt of an invoice and receipt by the contracting authority of a duly constituted financial guarantee equal to at least 30% of the maximum total amount agreed in the contract;
- Interim payment (30%)
- Final payment.

1.11. CONFIDENTIALITY, DATA PROTECTION MATTERS AND PENALTY CLAUSES

Confidentiality is required of all persons working or collaborating directly or indirectly in the performance of tasks following this call for tender, as they might come into contact with confidential information during the course of their work. Any breach of confidentiality will be treated as professional misconduct and could lead to the termination of the contract as set out in Article II.5 of the draft service contract. The institutions reserve the right to instigate any legal proceedings for breach of confidentiality necessary.

Specific requirements relating to personal data and the protection thereof are set out in the contract. The contractor is responsible for ensuring that all data to which he/she or his/her staff become party during the execution of the contract must be treated confidentially and in conformity with EC regulation № 45/2001.⁴⁸ The contractor is equally responsible for ensuring the application of this obligation in respect of any of his/her direct or indirect sub-contractors.

2. INFORMATION ON TENDERING

2.1. ELIGIBILITY

This invitation to tender is open to tenderers from the Member States of the European Union and the European Economic Area⁴⁹. Participation in tendering procedures is open on equal terms to all natural and legal persons in a third country which has a special agreement with the EU in the field of public procurement on the conditions laid down in that agreement.

⁴⁸ Regulation (EC) No 45/2001 of the European Parliament and of the Council of 18 December 2000 "on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data", OJ L 8 of 12.01.2001.

⁴⁹ States covered by the Public Procurement Agreement concluded within the World Trade Organisation are not included in this call for tenders as the EU Executive Agencies are not signatories of the Agreement.

2.2. VOLUME OF THE MARKET

The estimated maximum amount for the execution of all the tasks referred to in this call for tenders is 1,250,000 EUR including all charges and expenses, including the travel and subsistence expenses and the reimbursable expenses. This covers the total initial duration of the contract (24 months). No contract offer above this amount will be considered.

2.3. LOTS

- Not applicable to the present invitation to tender.

2.4. VARIANTS

Tenderers may not submit tenders for only part of the services required. Variants are not allowed.

2.5. TENDERS FROM CONSORTIA

A joint tender is a situation where a tender is submitted by a group of economic operators (consortium).

The EASME will not request consortia to have a given legal form in order to be allowed to submit a tender, but reserves the right to require a consortium to adopt a given legal form before the contract is signed, if this change is necessary for the proper performance of the contract. This can take the form of an entity with or without legal personality but offering sufficient protection of the EASME's contractual interests (depending on the Member State concerned, this may be, for example, a consortium or a temporary association).

If a consortium is envisaged, its composition should be specified, and the documents necessary to demonstrate fulfilment of the exclusion and selection criteria (see below) must be provided for each individual member of the consortium. In this case of consortium, the criteria must be met by the consortium as a whole. In addition, one of the consortium members must be designated as lead contractor, and must ensure full responsibility towards the EASME as regards both the tender and the future framework contract. The contract will be signed with the designated lead contractor. The tender must clearly indicate the lead contractor and the relationship and roles of all members of the partnership or consortium.

Partners in a joint offer assume joint and several liability towards the EASME for the performance of the contract as a whole, despite any statements in the offer assigning responsibility to specific members of the consortium. Should such statements appear in the tender, the EASME reserves the right to reject it without further evaluation, on the grounds that it does not comply with the tender specifications.

2.6. SUB-CONTRACTING

Subcontracting is defined as the situation where a contract has been or is to be established between the contracting authority and a contractor and where the contractor, in order to carry out that contract, enters into legal commitments with other legal entities for performing part of the work.

Subcontracting is permitted in the tender but 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).

The tenderers must indicate clearly in their methodology, which parts of the work will be sub-contracted, and the identity of all subcontractors undertaking more than 20% of the work by value.

Service providers must ensure that Article II.7 of the draft service contract can be applied to subcontractors. Once the contract has been signed, Article II.18 of the aforementioned contract will apply to subcontractors.

During contract execution, the change of any subcontractor identified in the tender will be subject to EASME's written approval.

2.7. COSTS

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

2.8. CONTRACTUAL CONDITIONS

The tenderer shall bear in mind the provisions of the draft service contract which specify the rights and obligations of the contractor, particularly those on payments, performance of the contract, confidentiality and checks and audits.

2.9. FORM AND CONTENTS OF THE TENDERS

- All tenders, including the forms annexed to this document, must be signed by an authorised person or by the tenderer's legal representative.
- Tenders must be clear and concise, with continuous page numbering, and assembled in a coherent fashion (e.g. bound or stapled, etc.). Since tenderers will be judged on the contents of their written bids, these must make it clear that they are able to meet the requirements set out in the specifications.
- Tenders may be drafted in any official language of the European Union⁵⁰. Should a language other than English be used, EASME requests the inclusion of a summary in English, to facilitate and speed up the selection process.
- Tenders must be delivered according to the requirements set out in the letter of invitation to tender and the present specifications, and before the date and time indicated in that letter.

Tenders must include the following information:

- All the **information and documents requested by EASME, duly filled in and signed**, in order to assess the different criteria. A checklist of the documents to submit is provided in Annex 8;

⁵⁰ Bulgarian, Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, German, Greek, Hungarian, Irish, Italian, Latvian, Lithuanian, Maltese, Polish, Portuguese, Romanian, Slovak, Slovene, Spanish, Swedish.

- 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 points 1.3 and 1.5 above;
- the **price in Euro**.

2.10. SUBMISSION OF TENDERS

Tenders must be submitted in triplicate (one clearly marked "Original" and two copies) in paper form. In order to facilitate the work of copying the tenders where necessary, it is requested that one of the copies (identical to the original) should be presented in a non-bound format allowing it to be duplicated more easily. A copy of the tender documents must also be submitted in electronic format (PDF or compatible), on a CD USB stick.

Tenderers shall observe precisely the indications in points 3 and 4 of the invitation to tender, in order to ensure that their tenders are admissible.

Evidence of timely submission by post or courier service will be constituted by the date of dispatch, the postmark or the date of the deposit slip. In the case of hand delivery, the signed and dated receipt will serve as evidence.

Late submission will lead to the non-admissibility of the tender and its outright rejection. Tenders sent by e-mail or by fax will also be non-admissible.

2.11. STRUCTURE OF TENDERS

Tenders must contain the following sections:

- Section 1: Administrative proposal and presentation of the tenderer;
- Section 2: Technical proposal, addressing technical specifications and selection and award criteria;
- Section 3: Financial offer.

2.11.1. Section 1 – Administrative proposal

This section must provide the following information, set out in the standard forms attached to these tender specifications:

- **Tenderer's identification**

The tender must include a letter of submission of tender (see 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 contact person in relation to this tender.

All tenderers must provide proof of registration, as prescribed in their country of establishment, in one of the professional or trade registers, or provide a declaration or certificate.

If the tenderer is a natural person, he or she must provide a copy of the identity card or passport and proof that he or she is covered by the social security scheme as self-employed person.

In case of a joint tender, the letter of submission of tender must be signed by a duly authorised representative for each tenderer, or by a single tenderer duly authorised by other tenderers with power of attorney (model provided under Annex 6).

If applicable, the letter of submission of tender must indicate the proportion of the contract to be subcontracted.

Subcontractors whose share of the contract is above 20% must provide a letter of intent (model provided under Annex 7) stating their willingness to provide the service foreseen in the offer and in line with the present tender specifications.

In case of a joint tender, the letter of submission of tender must be signed by a duly authorised representative for each tenderer, or by a single tenderer duly authorised by other tenderers with power of attorney (model provided under Annex 6).

- **Legal entities**

In order to prove their legal capacity and their status, each tenderer (including subcontractors whose share of the contract is above 20%, or any members of the consortium or grouping) must provide a signed Legal Entity Form with its supporting evidence. The form is available on the URL address specified in the letter of submission form (Annex 2). This form will be accompanied by a number of supporting documents available on the web site:

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

In case of joint tender, the supporting evidence requested will only be submitted by the consortium member designated as lead contractor.

Tenderers and subcontractors 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.

- **Financial identification**

The tenderer (or the appointed representative in case of joint tender) must provide a Financial Identification Form and supporting documents. Only one form per offer should be submitted (no form is needed for subcontractors and other joint tenderers). The form is available on the URL address specified in the letter of submission form (Annex 2)

Tenderers must provide the following information if it has not been included with the Legal Entity Form:

1. 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 which applies to the legal entity concerned requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.
2. For natural persons, where applicable, a proof of registration on a professional or trade register or any other official document showing the registration number.

2.11.2. Section 2 – Technical proposal

The technical proposal 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 excluded on the basis of non-conformity with the tender specifications and will not be evaluated.

2.11.3. Section 3 - Financial offer

Tenderers must complete Annex 5 with the data of their financial offer.

The price for the tender must be quoted in euro even for tenderers from countries outside the euro zone. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to assume 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 of 8 April 1965 (OJ L 152 of 13 July 1967). The amount of VAT may be shown separately. Exemption is therefore granted to the EASME by the governments of the Member States, either through refunds upon presentation of documentary evidence or by direct exemption.

For those countries where national legislation provides an exemption by means of a reimbursement, the amount of VAT is to be shown separately. In case of doubt about the applicable VAT system, it is the tenderer's responsibility to contact his/her national authorities to clarify the way in which the European Union is exempt from VAT.

The quoted price must be a fixed amount. That price should include all charges (fees, meetings, administrative expenses, overheads, travel and subsistence expenses. No additional refund request in respect of the above mentioned charges will be accepted.

Reimbursables

For the matchmaking events organised in third countries (ie. beyond Europe) under the Work Package 2, travel (airplane tickets) and hotel (including breakfast) costs and registration fee (when required) for invited participants (selected European delegates, staff of the Contractor, and invited experts) will be reimbursed up to 1.500 Euros per mission per person.

For matchmaking events organised in Europe under the Work Package 2,, travel (airplane tickets) and hotel (including breakfast) costs and registration fee (when required) for invited participants (selected European delegates, staff of the Contractor, and invited experts) will be reimbursed up to 900 Euros per mission per person.

Meals and local transportation costs for the staff of the Contractor and invited experts will be reimbursed with a flat rate of 250 Euro per event per person.

Meals and local transportation costs for selected European delegates (consisting of the cluster representatives) will not be covered under this service contract.

For the matchmaking events organised in third countries (ie. beyond Europe) under the Work Package 2, a provision for a contribution to the cost of premises in third countries, catering and technical equipment including the interpretation expenses (see task 2.1 under WP2) could be included with a maximum total of 40.000 Euros for the four outgoing cluster matchmaking events to be organised in third countries.

The total maximum amount to be reimbursed for all 10 missions to be organised under this contract is fixed at 330.000 Euros.

In support of the financial proposal fixing the global amount dedicated to these events, a detailed budget planning shall be provided with estimates of such expenses for one specific event based on the average of the costs of organising an event in Brazil and another in Vienna. A short explanation on how the global budget was calculated shall also be joined.

Different price options will not be accepted and will entail the refusal of the offer.

3. EVALUATION AND AWARD OF THE CONTRACT

3.1. EVALUATION STEPS

The evaluation is based on the information provided in the submitted tender. It takes place in three steps:

- Step 1: Verification of non-exclusion of tenderers on the basis of the exclusion criteria;
- Step 2: Selection of tenderers on the basis of selection criteria (economic and financial capacity of the tenderer and technical and professional capacity the tenderer and the performing team);
- Step 3: Evaluation of tenders on the basis of the award criteria (technical and financial evaluation of the offer).

Only tenders meeting the requirements of the preceding step will pass on to the next step.

3.2. EXCLUSION CRITERIA (ARTICLES 106, 107 OF THE FINANCIAL REGULATION)

Tenderers shall provide a declaration on their honour (see Annex 3), duly signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in this Annex 3. In the case of a joint tender, the declaration on the honour shall be provided by all the members of the group.

The declaration on the honour is also required for identified subcontractors whose intended share of the contract is above 20%.

The successful tenderer shall provide the documents mentioned as supporting evidence in Annex 3 before signature of the contract and within the deadline given by EASME. This requirement applies to all members of the consortium in case of joint tender and to subcontractors whose intended share of the contract is above 20%.

The contracting authority may waive the obligation for a tenderer to submit documentary evidence if such evidence has already been submitted for another procurement procedure and provided the documents were issued not more than one year earlier and are still valid. In such cases, the tenderer must declare on his honour that the documentary evidence has already been provided in a previous procurement procedure, provide reference to that procedure, and confirm that there has been no change in situation.

Without prejudice to the application of penalties laid down in the contract, candidates or tenderers and contractors who have made false declarations, have made substantial errors or committed irregularities or fraud, or have been found in serious breach of their contractual obligations may be excluded from all contracts and grants financed by the EU budget for a maximum of five years from the date on which the infringement is established as confirmed following an adversarial procedure with the contractor. That period may be extended to ten years in the event of a repeated offence within five years of the date referred to in the first subparagraph.

Candidates or tenderers who have made false declarations, have submitted substantial errors, irregularities or fraud, may also be subject to financial penalties representing 2% to 10% of the total estimated value of the contract being awarded. Contractors who have been found in serious breach of their contractual obligations may be subject to financial penalties representing 2% to 10% of the total value of the contract in question. The rate may be increased to 4% to 20% in the event of a repeat infringement within five years of the date on which the infringement is established as confirmed following and adversarial procedure with the contractor.

3.3. SELECTION CRITERIA

Tenderers must prove their economic, financial, technical and professional capacity to carry out the work subject to this call for tender.

The evidence requested should be provided by the contractor and/or each member of the group in case of joint tender and subcontractor whose intended share of the contract is above 20%. However, a consolidated assessment will be made to verify compliance with the minimum capacity levels.

3.3.1. *Economic and financial capacity criteria and evidence*

Proof must be furnished as follows:

- Copy of the official balance sheets and profit/loss accounts for the last 3 years for which accounts have been closed showing the annual pre-tax profit. If for a valid reason tenderers are unable to provide these documents, they must enclose a statement declaring their annual pre-tax profits for the relevant year(s). If the balance sheets show an average loss over the past 3 years, then another document must also be furnished additionally as proof of their financial and economic capacity, such as appropriate bank references or proof of professional risk insurance cover.

All the above documents must be provided by:

- The tenderer(s);
and
 - Each member of consortia/partnerships;
and
 - Each subcontractor whose intended share of the contract is above 20%.
- Statement of the overall annual turnover in the provision of similar services for the last 3 years for which accounts have been closed. Consortia must provide separate documents for each member, plus a document showing consolidated figures.

All the above documents must be provided by:

- The tenderer(s);
and
- Each member of consortia/partnerships: in this case in addition to the individual statements, they must provide a document showing consolidated figures;
and
- Each subcontractor whose intended share of the contract is above 20%.

If for an exceptional reason that the awarding authority considers justified, a tenderer is not in a position to produce the above-required references, he/she is authorised to prove his/her economic and financial capacity by all other means which the awarding authority judges appropriate. The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links 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.

3.3.2. *Technical and professional capacity criteria and evidence*

The tenderers must have the necessary expertise, technical and professional capacity to carry out the tasks described in section 1.4.

➤ Criteria relating to tenderers:

The tenderer must prove that he/she fulfils the following criteria:

- ✓ A minimum of three (3) years of professional experience and specific knowledge in the area of international cluster management and cooperation, with proven successful track record of studies and activities performed;
- ✓ A minimum of three (3) years of professional experience in the field of drafting reports, surveying techniques, collection of data, qualitative analyses, conducting data analysis, foresight analysis and drafting recommendations, with a proven successful track record of publications and studies performed, in particular in the area of cluster (relevant for the call);
- ✓ Proven experience in managing and organising high-level workshops and/or conferences at international level outside Europe and facilitating policy discussions in regions, EU Member States or at European or International level involving high-level experts and policy makers;
- ✓ A minimum of three (3) years of professional experience in web tool/site design and development and management as well as good knowledge of IT tools;
- ✓ Very good command of the English language at the level of native speakers or equivalent and high quality of written language skills in English, including proven experience in journalistic drafting, editing and (re)writing of texts in English to draft reports, write articles for the web, prepare newsletters and draft policy recommendation.

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

➤ Criteria relating to the team delivering the service:

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

- ✓ Project Manager: at least 3 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.
- ✓ Expert(s): at least 3 years' professional experience in the facilitation of networking and community building, particularly between cluster organisations,
- ✓ Experts: at least 2 years' professional experience in data collection and analysis techniques.
- ✓ Experts: at least 3 years' professional experience in computer science and IT/web development (design and development, technical and functional analysis).
- ✓ Experts: at least 2 years' professional experience in planning and conducting interviews or surveys.

Language quality check: all members of the team should have B2⁵¹ level language skills in English, as guaranteed by a certificate or past relevant experience. Those involved in the drafting of the deliverables/reports must have a higher level of English language skills (C1/C2⁵²).

➤ Evidence

The following evidence will be provided to prove fulfilment of the above criteria:

- List of relevant services provided in the past three years, with sums, dates and recipients, public or private. The most important services shall be accompanied by certificates of satisfactory execution, specifying that they have been carried out in a professional manner and have been fully completed;
- Detailed curriculum vitae for each of the team members of up to two A4 pages and covering relevant educational and professional qualifications. The CVs 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;

⁵¹ Level envisaged by the Common European Framework of Reference for Languages: Learning, Teaching, Assessment, abbreviated as CEFR. The CEFR describes language ability on a scale of levels from A1 for beginners up to C2 for those who have mastered a language. Information on the CEFR can be found on the Council of Europe website: http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp Self-assessment grids can be found at <http://europass.cedefop.europa.eu/en/resources/european-language-levels-cefr>

⁵² Levels envisaged by the CEFR, see previous footnote

- For the project leader, proof of experience in project management gathered within the last 5 years.
- A summary table indicating the members of the team and describing their roles and involvement in each project phase. It should also include breakdown of costs per team member and number of hours/days each team member will spend on each project phase (see annex 2).
- Any other document which is considered useful

3.4. AWARD CRITERIA

- The **quality** of the tender will be evaluated based on the following criteria:

- **Overall quality of the proposal (maximum 10 points – minimum threshold 60%)**

This criterion serves to assess the overall clarity of formulation and presentation of the tender. The tenderer should be able to present a complete, consistent and detailed offer in a concise manner, demonstrating his/her understanding of the tasks to be performed as well as overall coherence of the planned work to be carried out in order to achieve the objectives and avoiding superfluous quotes from these tender specifications or reference to irrelevant information.

- **Project management: adequacy and reasonableness of the resources allocated (maximum 10 points – minimum threshold 60%)**

This criterion serves to assess the overall adequacy of the project management (in terms of detailed timetable/roadmap and organisation of the work to be done), the efforts and the human, financial and technical resources allocated for each project phase based on the detailed breakdowns provided (Work packages and each task).

- **Quality, relevance and technical strength of the proposed approach for the development and maintenance of a web-based Platform facilitating the networking and community building between cluster organisations within and beyond Europe (maximum 30 points - minimum threshold 60%)**

This criterion serves to assess whether the methodology proposed by the contractor is suitable to accomplish the objectives of the whole Work Package 1. The proposed methodology is expected to build upon part 1.4. of these tender specifications, but to be described in more detail and in operational terms.

- **Quality, relevance, innovativeness and coherence of the proposed approach for the organisation of international and European cluster matchmaking events (maximum 30 points - minimum threshold 60%)**

This criterion serves to assess whether the methodology proposed by the contractor is suitable to accomplish the objectives of the whole Work Package 2. The proposed methodology is expected to build upon part 1.4. of these tender specifications, but to be described in more detail and in operational terms.

- **Quality, relevance, completeness and coherence of the proposed approach for the facilitation of international cluster cooperation with strategic global partners (maximum 20 points - minimum threshold 60%)**

This criterion serves to assess whether the methodology proposed by the contractor is suitable to accomplish the objectives of the whole Work Package 3. The proposed methodology is expected to build upon part 1.4. of these tender specifications, but to be described in more detail and in operational terms.

The maximum total quality score is 100 points (corresponding to 100% of the final score).

Tenders that receive less than 60% of the maximum possible mark for each of the quality criteria will be eliminated and their final score will not be calculated.

The above criteria will be assessed on the basis of the supporting documents and/or details provided in the tender, as listed in Annex 4, and any other documents that the tenderer considers useful for this purpose.

Tenders which do not obtain at least 60% of the maximum score for each of the award criteria and at least 70% of the overall score will not be admitted to the next stage of the evaluation procedure.

The EASME will award the contract to the economically most advantageous tender as stated below.

- The corresponding contract will be based on the draft contract annexed to the present invitation to tender, completed on the basis of the data provided in the selected tender.
 - EASME reserves the right not to select a contractor if the price of the offers proposed is in excess of the budget allocated to this project.
- **The total price** (corresponding to 50% of the final score)

The formula used to rank tenders and to calculate which tender offers the best value for money incorporates the quality mark and the price, expressed in the form of indices.

After evaluation of the quality of the tenders, the evaluation committee will proceed with the financial comparison of the tenders retained for further consideration according to the following formula:

$\text{Score for tender X} = \frac{\text{Cheapest price}}{\text{Price for tender X}} * \text{Total quality score (out of 100) for all criteria of tender X}$
--

3.5. INFORMATION TO TENDERERS ON THE FINAL EVALUATION

The 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.

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

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

4. ANNEXES

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

Annex 1: Draft contract (for information)

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

Annex 3: Declaration on honour (exclusion criteria)

Annex 4: Technical tender form

Annex 5: Financial offer (price and breakdown of costs)

Annex 6: Power of attorney

Annex 7: Letter of intent for sub-contractors

Annex 8: Checklist for Submission