



**EUROPEAN COMMISSION**  
DIRECTORATE-GENERAL REGIONAL AND URBAN POLICY  
**Unit Inclusive Growth, Urban and Territorial Development**

## **CALL FOR TENDERS**

**N° 2017CE160AT140**

**EU-CELAC COOPERATION ON TERRITORIAL COHESION**

**EU-CELAC INNOVACT PLATFORM II  
INNOVATION TO PROMOTE TERRITORIAL COHESION  
(INNOVACIÓN para el fomento de la Cohesión Territorial)**

# **TENDER SPECIFICATIONS**

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# **1. INFORMATION ON TENDERING**

## **1.1. Participation**

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

It is also open to all natural and legal persons established in a third country which has a special agreement with the Union in the field of public procurement on the conditions laid down in that agreement. Where the plurilateral Agreement on Government Procurement<sup>1</sup> concluded within the World Trade Organisation applies, the participation to this procedure is also open to all natural and legal persons established in the countries that have ratified this Agreement, on the conditions it lays down.

## **1.2. Contractual conditions**

The tenderer should bear in mind the provisions of the draft contract which specifies the rights and obligations of the Contractor, particularly those on payments, performance of the contract, confidentiality, and checks and audits.

## **1.3. Compliance with applicable law**

The tender must comply with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU<sup>2</sup>.

## **1.4. Joint tenders**

A joint tender is a situation where a tender is submitted by a group of economic operators (natural or legal persons). Joint tenders may include subcontractors in addition to the members of the group.

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

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

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<sup>1</sup> See [http://www.wto.org/english/tratop\\_E/gproc\\_e/gp\\_gpa\\_e.htm](http://www.wto.org/english/tratop_E/gproc_e/gp_gpa_e.htm)

<sup>2</sup> Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014 on public procurement and repealing Directive 2004/18/EC (OJ L 94, 28.3.2014, p. 65).

## **1.5. Subcontracting**

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

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

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

## **1.6. Structure and content of the tender**

The tenders must be presented as follows:

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

Part B: Non-exclusion (see section 4.1)

Part C: Selection (see section 4.2)

Part D: Technical offer

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

Part E: Financial offer

The price for the tender must be quoted in euro. Tenderers from countries outside the euro zone have to quote their prices in euro. The price quoted may not be revised in line with exchange rate movements. It is for the tenderer to bear the risks or the benefits deriving from any variation.

Prices must be quoted free of all duties, taxes and other charges, including VAT, as the European Union is exempt from such charges under Articles 3 and 4 of the Protocol on the privileges and immunities of the European Union. The amount of VAT may be shown separately.

The quoted price must be a fixed amount which includes all charges (including travel and subsistence). Travel and subsistence expenses are not refundable separately.

## **1.7. Identification of the tenderer**

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

In case of joint tender, the cover letter must be signed either by an authorised representative for each member, or by the leader authorised by the other members with powers of attorney. The signed powers of attorney must be included in the tender as well. Subcontractors that are identified in the tender must provide a letter of intent signed by an authorised representative stating their willingness to provide the services presented in the tender and in line with the present tender specifications.

All tenderers (including all members of the group in case of joint tender) must provide a signed Legal Entity Form with its supporting evidence. The form is available on: [http://ec.europa.eu/budget/contracts\\_grants/info\\_contracts/legal\\_entities/legal\\_entities\\_en.cfm](http://ec.europa.eu/budget/contracts_grants/info_contracts/legal_entities/legal_entities_en.cfm)

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

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

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

## **2. TECHNICAL SPECIFICATIONS**

### **2.1. General background**

The evolution of EU and Latin American economies and partnership over the last 20 years is marked by regular and important growth in trade and investments and an increasing number of ties generated by private companies and a vast array of public supported cooperation schemes.

The international dimension of EU regional policy has gained in importance over the last years. There are currently regional policy dialogues formalized through written agreements with 6 CELAC<sup>3</sup> countries: Argentina, Brazil, Chile, Colombia, Mexico and Peru.

The EU-CELAC Action Plan approved at the last EU-CELAC Summit (Brussels, 10-11 June 2015) emphasises the need to promote the exchange of experience and best practice between the European Union and CELAC countries on “territorial cohesion and equity and on regional development policies, with a particular focus on cross border cooperation and on territorial development strategies, to strengthen the capacity of the regional and urban authorities to promote economic development and innovation and social inclusion and cohesion”.

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<sup>3</sup> Community of Latin American and Caribbean States

Innovation is a key factor in creating competitive economies in the era of globalisation. Experience from the EU shows that regional level authorities, the private sector and the research community play a major role in creating new economic opportunities based on innovation and in reducing dependence on declining sectors.

For these reasons, both the EU and Latin America and the Caribbean (LAC) acknowledged the need to foster the innovation dimension of our cooperation and develop a bi-regional agenda as agreed at the last Joint Initiative on Research and Innovation (JIRI) SOM meeting held in San Salvador in October 2017. Through dialogue and cooperation on innovation, it is hoped to improve further the access for EU companies to the LAC market and the conditions under which they can conduct research and innovation activities there and vice-versa.

It also shows that the development of territorial cooperation actions, in particular cross-border cooperation, is a fundamental factor for the development of regional integration processes, of economic and social cohesion, and of progress. EU cross-border cooperation programmes deal with a wide range of issues, which include innovation and encouraging entrepreneurship, especially the development of SMEs.

In Latin America, many countries are seeking to diversify away from a longstanding dependence on commodities to create economies with greater focus on added value activities. As part of this, they are seeking to promote a new development model which uses the capacities of the regions (at sub-national level) which is linked in general to broader political processes in favour of a greater decentralization of power, including as regards the economy.

A move of this nature in Latin American countries will most probably need coordinated action and a set of instruments and policies that would be of close nature to those developed in the EU over the past years.

In this context, the experience of EU regions in developing and implementing their own regional innovation strategies, within a broad EU framework which provides not only financial support at each stage, but also technical and expert assistance, is of particular interest. It is an approach which involves the identification of a restricted number of promising sectors, including new opportunities in otherwise traditional sectors, the promotion of clusters, developing small and medium enterprises (SMEs) and encouraging innovation through what have become known as "Smart Specialisation Strategies" (S3 or RIS3<sup>4</sup>).

A key element is the involvement of a widely drawn partnership from the public sector, the private sector and the research community, building on the existing R&I cooperation through the EU Research framework programmes at bilateral and at regional level. The EU experience also emphasises inter-regional and trans-national exchanges of experience and best practice at the EU level, at all levels of the conception and implementation of a RIS3.

The international dimension is equally important. The globalized economy and the increasing role of global innovation networks call for a regional innovation policy that goes beyond regional and national borders. Actions needed take into account the degree to which actors

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<sup>4</sup> RIS3 stands for Research and Innovation Strategies for Smart Specialisation.

are able to generate global partnerships for business and knowledge development and to position their region in global value chains.

This opens a vast field for potential long-term win-win partnerships where the EU experience could be a source of inspiration for Latin American border regions.

Based on EU experience, DG REGIO has supported since 2011 several projects in Latin America to exchange experiences between Latin American and European regional authorities and specialized agencies in policy setting, implementation and management with respect to clusters and SME innovation inducing policies, including a cross-border dimension. For more information: [http://ec.europa.eu/regional\\_policy/en/policy/cooperation/international/latin-america/](http://ec.europa.eu/regional_policy/en/policy/cooperation/international/latin-america/)

In particular, DG REGIO is currently<sup>5</sup> supporting the INNOVACT project ([www.innovactplatform.eu](http://www.innovactplatform.eu)) to diffuse the EU regional policy experience and good practices and to develop further cooperation between regional authorities and specialized agencies on innovation policy decision making and governance from EU and Latin American border regions. The Latin American border areas currently covered by the project are:

- Colombia-Ecuador,
- Colombia-Peru,
- Chile-Peru,
- Guatemala-Mexico

Specific objectives of the project are to facilitate the sharing of information and lessons learned on promoting cross-border regional innovation systems, policy setting, implementation and management with respect to clusters and SME innovation inducing policies in domains of common interest, in order to contribute to a learning process based on concrete examples and best practices, as well as the identification and development of strategies, action plans and concrete projects or programmes for the development of cross-border value chains, that each participating Latin American border region can implement in the short term.

**Through this call for tenders, DG REGIO aims to extend the number of Latin American border regions covered by the platform, as well as to provide tailored support/training to the four border areas covered during the first phase.**

The specific border areas for study under the second phase of the project are presented in the following sections.

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<sup>5</sup> The first phase of INNOVACT runs between May 2017 and December 2018.

## **Argentina-Brazil-Paraguay**

Within the triangle Argentina, Brazil and Paraguay, the Triple Border is usually considered to be the larger area surrounding the cities of Ciudad del Este (Paraguay), Foz de Iguazú (Brazil.) and Puerto Iguazú (Argentina).

The Argentinian province of Misiones is located in the heart of this border region, with a population of 1.2 million people in 2018. This province shares only 90 kilometres of internal borders with the rest of Argentina, but its longest borders are shared with Brazil (900 km) and Paraguay (367 km). Over 50 million residents live within 1,000 km of either side of the border, with major areas of agricultural and agro-industrial production located on the border: Itapúa and Alto Paraná Departments from Paraguay and R o Grande do Sul, Santa Catarina and Paran  states from Brazil.

The Province of Misiones includes 38 border crossings, one third of the crossings of Argentina and it is characterized by a very different export profile from other provinces of Argentina because, although their production is based on the work of large numbers of farmers, only tobacco and citrus fruits are exported as primary products. The main items of foreign sales are concentrated in the so-called agricultural manufactures, such as black tea, coarse ground yerba mate, and woodwork. The other major category is exports of industrial origin, concentrated in shipments of cellulosic pulp and paper.

Currently the provincial government develops active public policies promoting innovation, productive development and investment, generating added value for products. In that context, the value chains that could be considered in the framework of the project will be black tea and industrial forestry.

With respect to black tea, there are more than 38,000 hectares in the Misiones province, corresponding to 95% of the area planted with tea in the country 85 and 95 % of production is exported. On the other hand, in Brazil, the production of tea is falling but the country (namely, Paran , Santa Catarina and Rio Grande do Sul) has extensive expertise in food and beverage processing. There are therefore potential benefits for both Argentinian producers and Brazilian processing food industries to cooperate.

Industrial forestry is also a promising sector as there is a high demand of wood chip in order to feed boilers generating thermal energy from industries located in Santa Catarina, Paran  and R o Grande do Sul. The indirect supply of biomass in Misiones, resulting from conventional forest plantations, is approximately 1.616.000 tonnes per year. Much of this volume is destined to the pulp and paper industry, with low values per tonne paid to the operators of the raw material. Another immediate opportunity for this sector is the provision of parts for wooden furniture components where small and medium sawmills from Misiones, could cooperate with Brazilian furniture manufacturers.

## **Bolivia-Peru**

In the framework of their bilateral relations, Peru and Bolivia have established a Bi-national Cabinet ("Gabinete Binacional"). Bi-national Cabinets are the highest level of bilateral relations, chaired by the Presidents of the two countries and integrated by operators in various sectors.

Agreements on social, economic development, integration infrastructure, mainly in the field of social and economic development, are adopted in the Cabinets. Border integration has an important place in the agreements of Bi-national Cabinets, considering that the border is the privileged area of bilateral integration and cooperation.

An Area of Border Integration ("Zona de Integración Fronteriza") has been also established, which is the territory in which the countries will implement joint actions to strengthen development and integration. Similarly, local mechanisms for border integration have been developed, such as the Border Committees ("Comités de Frontera"), in which the authorities and institutions of the border territories are taking part.

Specific commitments related to cross border productive development have been adopted in recent Binational Cabinets, namely it has been approved the implementation of the Plan of Integration for the Development of the Amazonian Sector of the Border Integration Area, which contains a proposal for a cross-border innovation strategy, as well as proposals to support the sectors of Amazonian fruits, fish farming and tourism.

Finally, and building on the results of recent EU projects, it has been decided to further support in the Andean sector of the border, sectors such as fibre of camelids, indigenous potatoes, coffee and community-based tourism.

## **Ecuador-Peru**

As for the case of Bolivia-Peru, in the framework of their bilateral relations, Ecuador and Peru have established a Bi-national Cabinet ("Gabinete Binacional"), the highest level of bilateral relations, chaired by the Presidents of the two countries and integrated by operators in various sectors.

As mentioned above, agreements on social, economic development, integration infrastructure, mainly in the field of social and economic development, are adopted in the Cabinets. Border integration has an important place in the agreements of Bi-national Cabinets, considering that the border is the privileged area of bilateral integration and cooperation.

An Area of Border Integration ("Zona de Integración Fronteriza" – ZIF-) has been also established, which is the territory in which the countries will implement joint actions to strengthen development and integration. Similarly, local mechanisms for border integration have been developed, such as the Border Committees ("Comités de Frontera"), in which the authorities and institutions of the border territories are taking part.

In this respect, there is an important link between the bilateral mechanisms of the different levels of government and a defined area for border integration. In the case of the Cabinet Peru — Ecuador, the agreements set out the need to work together on productive value chains in the cross-border basins.

The ZIF Peru — Ecuador is very wide and covers areas of coastal zones, Andean and Amazonia areas where different agricultural productions are developed. However, there are crops such as cocoa which are common to different sectors of the border, as well as the interest of developing fish farming in the broad Amazonian area of the border.

## **2.2. General and specific objectives**

The general objective of this project is to diffuse the EU regional policy experience and good practices and to develop further cooperation between regional authorities and specialized agencies on innovation policy decision making and governance from EU and Latin American border regions. This will be done through the establishment of a **mechanism/platform for knowledge exchange and transfer of good practices** among participating (EU and Latin American) border regions on specific thematic areas.

Specific objectives of the project will be to facilitate the sharing of information and lessons learned on promoting cross-border regional innovation systems, policy setting, implementation and management with respect to clusters and SME innovation inducing policies in domains of common interest, in order to contribute to a learning process based on concrete examples and best practices, as well as the identification and development of strategies, action plans and concrete projects or programmes for the development of **cross-border value chains**, that each participating Latin American border region can implement in the short term.

The new Latin American border areas to be covered by the project will be:

- **Argentina-Brazil-Paraguay**
- **Bolivia-Peru**
- **Ecuador-Peru**

The following Latin American border areas covered under the first phase of the project will continue to receive tailored support, as described below (task 2.3.5):

- **Colombia-Ecuador,**
- **Colombia-Peru,**
- **Chile-Peru,**
- **Guatemala-Mexico.**

## **2.3. Tasks to be carried out by the Contractor**

### **A. New Border Areas (Argentina-Brazil-Paraguay; Bolivia-Peru; Ecuador-Peru)**

The Contractor will prepare, run and evaluate nine working meetings in Latin America and Europe, three study visits to Europe, training activities and will continue to feed and develop the current collaborative on-line platform ([www.innovactplatform.eu](http://www.innovactplatform.eu)) to facilitate the exchange of information and good practices. In addition to regional and local authorities and, on the basis of the European experience, the project focus should be concrete and operational and involve as much as possible stakeholders from both EU and Latin America such as firms, public and private agencies, Universities and research centres.

The Contractor shall perform the following tasks:

#### **2.3.1. Mapping and selection of value chains**

For each of the three new Latin American border areas, the Contractor will conduct mapping of stakeholders, partners, policies, programmes and project thematic challenges and opportunities. In particular the Contractor, in close cooperation with national and local

authorities, public institutions for research, innovation and development as well as with civil society organisations will make a proposal on the value chain(s) to be considered in the framework of the project.

To that end, the Contractor will conduct interviews with both national and local authorities and a critical mass of key stakeholders (minimum 20) to evaluate the involvement of the different actors in the process, to compare the different perceptions of the cross-border cooperation potential and actions needed, as well as the instruments currently used, if any, to facilitate cross-border cooperation on innovation and global value chains. The offer must detail the methodology for conducting the interviews.

The mapping work will result in a report to be approved by the Contracting Authority.

### **2.3.2. Selection of EU border areas**

The Contractor shall propose at least three EU border areas (including each regions from at last 2 different EU countries) to participate in the mechanism/platform for knowledge exchange and transfer of good practices on the specific thematic areas/value chains identified under task 2.3.1.

The Contractor shall propose and agree on a selection mechanism with DG REGIO. Under this mechanism, a reduced number of EU border areas/regions will be invited to present a proposal which will include a short description of their specific interest, best practices, objectives, possible existing ties with Latin American regions and commitment. The proposals should also link the proposed cooperation to EU business and research interests and ensure synergies with other initiatives.

Selection of the final participants will be subject to prior agreement of DG REGIO. The selection criteria should focus on regions' degree of commitment and interest, best practices and ability to deliver in the time allotted to the project. Final selection shall ensure coverage of diverse needs and best practices as well represent the diversity of European regions. Participation of the regions in other EU initiatives (in particular INTERREG) should be considered as an asset in the selection process.

Based on the proposals received, the Contractor should propose a matching between EU and Latin American regions/border areas. Participating regions should be offered the possibility to conclude formal cooperation agreements or alternatively engage directly in concrete cooperation projects identified through the networking and knowledge exchange process.

### **2.3.3. Networking and knowledge exchange, capacity building (duration at least 12 months)**

The main added value of the project for regions participating in the cooperation is the access to capacity development through networking and knowledge exchange with EU partners on the project themes. The Contractor will support networking and exchange through the organisation of a number of training sessions, seminars, technical meetings, workshops and study visits. In addition, the on-line platform is the main tool for continuous networking and knowledge exchange through which the Contractor shall organise also webinars and other activities.

The participants, and in some cases, the trainers in these activities should include local and regional authority officials at the political and technical levels, civil society organisations

(CSOs), private sector and national authorities. The development of knowledge exchange activities shall be agreed together with the relevant authorities and the EU, which will participate in those activities when deemed useful and subject to their budget availability. The Contractor shall explore actively the possibility of securing national and/or local authority co-funding for networking and knowledge exchange.

The study visits should include meetings with local authorities, CSOs, technology transfer agencies, development agencies and representatives of private sector business and financial institutions and would promote collaboration among regions in identifying innovative programs and strategies. It would encourage direct exchanges between regions facing similar problems by sharing information, best practices and lessons learned about turning sustainable and innovative cross-border and innovation policies into concrete actions.

The Contractor shall adopt a pro-active approach to identifying, analysing and systematising best practise emerging from the cooperation to ensure the project contributes to create new knowledge.

Activities will include, **for each** of the three Latin American border areas:

- **First working meeting** (duration at least 2 days, to be organised in each of the three Latin American border areas, three meetings in total). The main objective of the meeting is to generate a collaborative approach through: project presentation, description of objectives and goals of the project, presentation of participants, presentation to national, regional and local stakeholders (minimum 20) of the report on mapping and selection of value chains (task 2.3.1) and will provide the occasion to discuss opportunities and problems, needs, challenges and possible actions related to innovation partnerships in the cross-border area in each value chain, including human resources for innovation. The workshop will raise as well awareness of the participants on the key principles of European regional policy and on their implementation in the field of cross-border cooperation and should enable participants to understand the concepts provided by the specific policy instruments.
- **Second working meeting in Europe** for all participating Latin American regions (duration at least 2 days, in each of the participating EU regions, three meetings in total) to allow participants to exchange experiences on specific aspects. It should be developed through plenary sessions and working groups on the specific thematic areas. The main output will be the analysis and validation of the elements of success for the transfer of good practices. In this occasion, a **study visit** (3 to 4 days) to local best practices will be organised. A minimum of ten participants per Latin American border area will take part in the meetings and study visits to each of the three EU partner regions/border areas (total number of Latin American participants of minimum 30).
- **Third working meeting** in each Latin American border area (duration at least 2 days each, three meetings in total) to allow Latin American participants to exchange experiences and good practices on specific aspects. Each workshop will involve at least 12 people of the host border area, and at least 4 from each of the other 2 Latin American border areas (total number of Latin American participants of minimum 20). Following the working meeting, a **study visit** (2 to 3 days) to local best practices will be organised.

- **Closing conference/working meeting** in each of the three Latin American border areas (duration 1 to 2 days, three meetings in total). On the basis of the previous joint work on the adaptation and transfer of identified good practices, the main objective of the meeting will be the diffusion of the project results, including the presentation of the activities and plans identified by each region and the possible mechanism for (common) implementation. The Contractor will ensure the participation of a minimum of three representatives from European border areas (total number of European participants of minimum 9).
- Through the entire project, the **on-line platform** ([www.innovactplatform.eu](http://www.innovactplatform.eu)) will be a central tool and will include information on best practices emerging in the project areas, **e-learning, webinars**, search engine as well as an interactive forum to be used by participants to collaborate and communicate.

The on-line platform should continue to provide concrete cross-project learning opportunities (between EU and Latin American border areas but also between the Latin American border areas) and visibility.

Associated to the platform a database with European and partner country experts and business contacts, research centres, universities and other relevant public bodies will be established to support economic cooperation.

The Contractor shall identify, develop and produce all content to the on-line platform during the implementation phase.

- In the same way, through the entire project, the contractor will provide **ad hoc trainings or tutoring activities** for participating Latin American regions upon their request and following prior approval by the Contracting Authority. A minimum of 6 such trainings (at least 1 per Latin America border area) over the course of the project should be foreseen (minimum 60 man/days in total for the 6 trainings) for the total number of Latin American border areas. The content of the trainings shall be specified after the mapping exercise has been completed (task 2.3.1)

The Contractor will explore potential collaboration with the Smart Specialisation (S3) Platform established by the European Commission and will propose concrete cooperation activities to allow S3 Platform to act as a multiplier inside the EU to allow for wider EU participation in the project. Other similar multipliers should be identified in the partner countries to allow for a common shared knowledge on innovation solutions to be developed among EU and Latin American regions.

The Contractor shall implement each activity in Spanish and/or the language of the host city. Once the detailed programme for each meeting and visit has been drawn up (exact topics to be covered, speakers to be invited) it should be agreed upon with the Commission.

The Contractor shall ensure the presence of high level speakers/panellists, including members of the European institutions, national authorities, research community and civil society. The Contractor shall ensure the coordination and complementarity between all interventions. The speakers' interventions will be published electronically, and in agreement with the Commission, all interventions will be translated and made available in Spanish.

#### **2.3.4. Foster the development of action plans and projects (cross-border value chains), business promotion**

The Contractor is tasked to produce the following outputs (for each of the three border areas):

- A **strategy**, accompanied by an **action plan**, to develop and position in the international market the identified value chains. The strategy should be made jointly with the local authorities, public institutions for research and development as well as with civil society organisations, especially with the members of the existing bi-national structures or groups.
- **Programmes and pilot projects** which should be formulated in cooperation with the national and sectoral authorities in each country which should be practically orientated and suitable for execution after the end of the contract.

The strategies/action plans/pilot projects will be presented in the final conference/meeting for each of the three border areas.

The increased technical cooperation is expected to stimulate a demand for European business solutions to cross-border cooperation challenges. The Contractor should develop and implement a broader business promotion approach to the project to achieve matchmaking, joint ventures and other business cooperation. Businesses should also be supported to take part in seminars and workshops organised by the project.

#### **B. Former Border Areas (Colombia-Ecuador, Colombia-Perú, Chile-Perú and Guatemala-México)**

#### **2.3.5. Capacity building at local level (duration at least 12 months)**

Following the participation of the four border areas above in the first phase of INNOVACT, additional support shall be provided through **tailored trainings and tutoring activities (face-to-face)** for the relevant stakeholders (**local institutions, civil society organisations, private sector**) from the participating Latin American regions upon their request and following prior approval by the Contracting Authority.

A minimum of 12 such trainings (at least 2 per Latin America border area) over the course of the project should be foreseen (**minimum 150 man/days** in total for the 12 trainings) for the total number of Latin American border areas. It should include classroom training, group exercises, tutoring and technical consulting as appropriate. In addition, participants should be given the possibility to continue to benefit of the e-learning activities and webinars organised through the on-line platform (task 2.3.3).

A minimum of 120 participants (and at least 20 per border area, including public and private local institutions, clusters' representatives, export organisations, research institutions, CSOs) shall take part in the capacity building activities.

Technical assistance will be inspired by EU experience on cross-border cooperation and smart specialisation policies and strategies. The content of the training and capacity building activities will include *inter alia*:

- support on **formulation and implementation of bi-national projects and strategies**,

- support on **integration of value chains** and on marketing, identification and access to markets, generation of trademarks and denominations of origin, high-quality and signature/niche products.

In the case of the Colombia-Peru and Chile-Peru border areas, the contractor shall consider *inter alia* the following sectors: circular economy applied to agriculture (given the agricultural focus of both borders and the need to generate greater value at the border) and tourism.

EU border areas participating in the first phase of INNOVACT shall continue to be involved as much as possible in the capacity building activities under task 2.3.5.

### **C. Common tasks to new and former border areas**

#### **2.3.6. Promotion of project cooperation**

The objectives of the promotion of the project in partner countries is to increase awareness of the challenges linked to cross-border cooperation and innovation; to foster and increase visibility of the project and to attract other stakeholders to join the project.

The promotion of the project should emphasise the benefits of the cooperation while highlighting the need for commitment and action on the part of participants.

Media engagement is an important part of promotional activities. The project shall place news articles/videos (sponsored where necessary) in selected mass-media (papers, magazines, TV and Internet) operating nationally and in the border regions covered by the project. As media engagement evolves, it will be important to engage participating regions and other stakeholders in its evolution.-

The Contractor should be ready to produce high quality media inputs at short delay for main events or as otherwise requested by the Contracting Authority. The quick production of high quality press releases and articles may be required at any time. The Contractor should assure the highest linguistic and technical quality for these inputs.

#### **2.3.7. Liaison with regional and national authorities**

For the success of the project it will be crucial to promote effectively, and involve, stakeholders other than the cities and regions directly benefiting from the cooperation. Project results will depend on the degree of vertical integration of the different administrative layers in each country, as well as on the political legitimacy and credibility of the action.

In response, the Contractor is tasked with maintaining close relations with:

- National authorities, in particular those departments responsible for cross-border cooperation and border integration, research and innovation and international relations;
- Latin American regional and local networks, associations, administrations and agencies;
- European and national networks of border regions; and
- Financial institutions and private sector active in the fields covered by the project

The Contracting Authority should be kept informed of the relations the Contractor has with authorities.

### **2.3.8. Completion and dissemination**

The Contractor shall provide recommendations to ensure sustainability of project results and ensure dissemination of project results amongst participants and stakeholders.

#### **2.3.8. Details of how the tasks are to be carried out**

- (1) The Contractor shall work in close contact with the Commission, which will guide and monitor the quality of work and compliance with deadlines.
- (2) The Contractor shall appoint one experienced coordinator who will act as a single contact point for the Commission on all tasks, unless agreed otherwise for specific purposes.
- (3) The Contractor shall ensure that any sub-Contractor involved performs the work to a satisfactory standard. The Contractor will remain responsible for any work performed by sub-Contractors and for their compliance with the deadlines agreed by the Commission.
- (4) The Contractor will be responsible for all practical aspects of organising the working meetings, trainings and study visits:
  - fixing the dates and location (in agreement with the Commission);
  - sending out the invitations together with the schedule at least four weeks before the meetings and also the other appropriate documents (possibly subsequently);
  - practical arrangements (training rooms, interpretation in order to carry out the activities effectively to participants from all participating countries, hotel and restaurant reservations)
  - to continue to feed and develop the existing on-line platform for knowledge exchange, including preparation before implementation of the meetings and visits and transfer of good practices among regions on specific thematic areas;
  - providing online documentation of all lecturers' contributions;
  - registration of participants and organisation of their travel and subsistence expenses in/from Latin America/Europe;
  - organisation of the travel and subsistence expenses of the lecturers and European experts.
- (5) The Contractor will supervise and guarantee the respect of the calendar activities, the constant flow of information among the regions, and the support in analysing and systematizing the documents produced by each region.
- (6) The Contractor will ensure close coordination with other EU programmes and projects in the field of regional innovation. In particular, complementarities and synergies with the International Urban Cooperation (IUC) programme (funded by the Partnership Instrument) should be ensured. The International Urban Cooperation programme (2016-2019) will support in Latin America inter-regional (sub-national) cooperation on innovation ([www.iuc.eu](http://www.iuc.eu)).
- (7) The Contractor shall ensure complementarities with other planned EU-funded programmes in LA such as EUROFRONT which will strengthen Integrated Border Management (IBM) at four significant land crossing posts in Latin America and will support the fight against human trafficking and smuggling of migrants. In

particular, the Contractor shall seek synergies between INNOVACT and EUROFRONT in specific common border areas: i) Argentina-Brazil-Paraguay; ii) Bolivia-Peru; iii) Colombia-Ecuador.

- (8) The Contractor shall work in close contact with the Latin American national authorities in charge of border integration/regional development and the EU Delegations in the Latin American countries covered by the project for a briefing/debriefing on the planned activities.

#### **2.4. Time schedule and deliverables**

The duration of the tasks shall not exceed 18 months and the execution of the tasks shall start from the date of entry into force of the contract. The period of execution of the tasks may be extended only with the express written agreement of the parties before the expiration of such period.

After signature of the contract, a meeting will be fixed in Brussels.

#### **Indicative calendar**

Adaptation of this calendar may be agreed during the course of the contract.

<b>Indicative calendar</b>	<b>Meeting</b>
After signature of the contract	Coordination meeting in Brussels
6 weeks after signature of the contract	Inception report
First quarter 2019	Report on mapping and selection of value chains
Second and third quarter 2019	First working meeting (in each of the three new Latin American border areas) (three meetings in total)
Third and fourth quarter 2019	Second working meeting each of the three European border regions (for each of the three Latin American border areas) (three meetings and three study visits in total) Third working meeting (in each of the three new Latin American border areas) (three meetings in total)
First quarter 2020	Closing working meetings (for each of the three Latin American border areas) (three meetings in total)
First quarter 2019 to first quarter 2020	Capacity building at local level (Task 2.3.5)

Approximately one month before each of the activities listed above, the Contractor must attend a briefing meeting in Brussels at the offices of the Directorate-General for Regional and Urban Policy. Attendance via video-conferencing could be considered (with the exception of the first and last meeting). The final schedule of the activities and the briefing meetings prior to each one will be decided at the initial co-ordination meeting.

## **Deliverables**

- 1. An Inception report** explaining how the tasks (point 2.3) will be carried out: it will provide a detailed description of the organisation of the project. A detailed, updated work plan and timetable shall be submitted to the Commission for approval within 6 weeks after signature of the contract.

- 2. Interim reports**

An interim report shall be submitted to the European Commission presenting the mapping work and the proposal on the value chain(s) to be considered in the framework of the project (task 2.3.1).

After each round of working meetings (three in total), an interim report shall be submitted to the European Commission, explaining how the tasks (point 2.3) have been carried out, summarising the organisation, the main results, outcomes and conclusions of each activity, and detailing the remaining foreseen future activities until the completion of the contract. This report should be no longer than 60 pages (20 per working meeting).

- 3. A Final report**

Before the end of the period of execution of the tasks, a final report shall be submitted to the Commission. The final report will summarise the main findings and lessons of the above mentioned activities and come up with conclusions and an assessment of the actions taken or expected to be taken by the participants to shape up concrete projects on the ground.

The report will have four main sections for the respective programmes/activities with each of the three new Latin American border areas and the capacity building activities for the former Latin American border areas, for each section the maximum length of the final text should be not more than 50 pages, including up to 6 pages of executive summary. The Contractor should submit the text in English and Spanish. The strategies/action plans/pilot projects identified (task 2.3.4) should be included as annexes to the final report.

- 4. Output data**

Results of the execution of the assigned tasks and of the data gathered through them, including any interim or final evaluation or assessment and related activities, such as aggregated online user interaction, shall be made available to the maximum extent possible to the Contracting Authority. Such data shall be provided by the Contractor in a machine-readable, structured format for the purpose of further dissemination, exploitation and valorisation of the data thus acquired across the relevant EU programmes and initiatives.

The responsibility of ensuring compatibility of the data thus generated with the IT systems of the Contracting Authority shall lie with the Contractor. The Contracting Authority shall provide assistance with the transfer of the data into its own IT systems. The Contractor shall provide an accurate and sufficiently detailed written description of the transfer procedure, including the description of the storage format and of the data importing process, to ensure future usability of the data by the Contracting Authority.

The Contractor shall ensure compliance with the relevant legal requirements, notably with the Regulation (EU) 2016/679, in gathering, processing and transferring such data.

## **2.5. Estimated total value of the contract**

The **maximum** value of the contract is € 850,000 paid as a lump sum, including fees, travel expenses and other costs.

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

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

### **3.1. Content**

#### **3.1.1. Final report**

The final report must include:

- an abstract of no more than 200 words and an executive summary of maximum 6 pages, in English/Spanish;
- specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- the following disclaimer:

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

#### **3.1.2. Publishable executive summary**

The publishable executive summary must be provided in English/Spanish and must include:

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

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

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

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

For full details on the Commission policy on accessibility for information providers, see: [http://ec.europa.eu/ipg/standards/accessibility/index\\_en.htm](http://ec.europa.eu/ipg/standards/accessibility/index_en.htm)

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

### **3.1.4. Data accessibility and usability**

In order to increase synergies to the maximum extent possible across the various programmes and initiatives overseen by the Commission, including future developments, all data generated through activities in connection with this contract (such as lists, databases, mappings and other similar outputs) must be provided in a format that is fully compatible with the IT environment of the Commission.

The Commission will provide assistance for this purpose to the contractor as necessary, including technical specifications, in the course of the contract execution.

### **3.2. Graphic requirements**

The Contractor must deliver all publishable deliverables in full compliance with the corporate visual identity of the European Commission, by applying the graphic rules set out in the European Commission's Visual Identity Manual, including its logo. The graphic rules, the Manual and further information are available at:

[http://ec.europa.eu/dgs/communication/services/visual\\_identity/index\\_en.htm](http://ec.europa.eu/dgs/communication/services/visual_identity/index_en.htm)

A simple Word template will be provided to the Contractor after contract signature. The Contractor must fill in the cover page in accordance with the instructions provided in the template. The use of templates for studies is exclusive to European Commission's Contractors. No template will be provided to tenderers while preparing their tenders.

## **4. EVALUATION AND AWARD**

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

- Verification of non-exclusion of tenderers on the basis of the exclusion criteria
- Selection of tenderers on the basis of selection criteria
- Verification of compliance with the minimum requirements set out in these tender specifications
- Evaluation of tenders on the basis of the award criteria

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

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

#### **4.1. Verification of non-exclusion**

All tenderers must provide a declaration on honour (see Annex 1), signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in that declaration on honour.

In case of joint tender, each member of the group must provide a declaration on honour signed by an authorised representative.

In case of subcontracting, all subcontractors whose share of the contract is above 10 % and whose capacity is necessary to fulfil the selection criteria must provide a declaration on honour signed by an authorised representative.

The Contracting Authority reserves the right to verify whether the successful tenderer is in one of the situations of exclusion by requiring the supporting documents listed in the declaration of honour.

The successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender and to all subcontractors whose share of the contract is above **10** % and whose capacity is necessary to fulfil the selection criteria. The obligation to submit supporting evidence does not apply to international organisations.

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

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

#### **4.2. Selection criteria**

Tenderers must prove their legal, regulatory, economic, financial, technical and professional capacity to carry out the work subject to this procurement procedure.

The tenderer may rely on the capacities of other entities, regardless of the legal nature of the links which it has with them. It must in that case prove to the Contracting Authority that it will have at its disposal the resources necessary for performance of the contract, for example by producing an undertaking on the part of those entities to place those resources at its disposal.

The tender must include the proportion of the contract that the tenderer intends to subcontract.

#### **4.2.1. Declaration and evidence**

The tenderers (and each member of the group in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the declaration on honour (see Annex 1), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them individually. For the criteria applicable to the tenderer as a whole the tenderer (sole tenderer or leader in case of joint tender) must provide the declaration on honour stating that the tenderer, including all members of the group in case of joint tender and including subcontractors if applicable, fulfils the selection criteria for which a consolidated assessment will be carried out.

This declaration is part of the declaration used for exclusion criteria (see section 4.1) so only one declaration covering both aspects should be provided by each concerned entity.

The Contracting Authority will evaluate selection criteria on the basis of the declarations on honour. Nevertheless, it reserves the right to require evidence of the legal and regulatory, financial and economic and technical and professional capacity of the tenderers at any time during the procurement procedure and contract performance. In such case the tenderer must provide the requested evidence without delay. The Contracting Authority may reject the tender if the requested evidence is not provided in due time.

After contract award, the successful tenderer will be required to provide the evidence mentioned below before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender and to subcontractors whose capacity is necessary to fulfil the selection criteria.

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

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

#### **4.2.2. Legal and regulatory capacity**

Tenderers must prove that they are allowed to pursue the professional activity necessary to carry out the work subject to this call for tenders. The tenderer (including each member of the group in case of joint tender) must provide the following information in its tender if it has not been provided with the Legal Entity Form:

- For legal persons, a legible copy of the notice of appointment of the persons authorised to represent the tenderer in dealings with third parties and in legal proceedings, or a copy of the publication of such appointment if the legislation applicable to the legal person requires such publication. Any delegation of this authorisation to another representative not indicated in the official appointment must be evidenced.

- For natural persons, if required under applicable law, a proof of registration on a professional or trade register or any other official document showing the registration number.

#### **4.2.3. Economic and financial capacity criteria**

The tenderer must have the necessary economic and financial capacity to perform this contract until its end. In order to prove their capacity, the tenderer must comply with the following selection criteria.

- Turnover of the last two financial years above EUR € 1 000 000; this criterion applies to the leader tenderer as a whole, i.e. the combined capacity of all members of a group in case of a joint tender.

#### **Evidence (to be provided on request):**

- Copy of the profit and loss accounts and balance sheet for the last two years for which accounts have been closed from each concerned legal entity;
- Failing that, appropriate statements from banks;

If, for some exceptional reason which the Contracting Authority considers justified, a tenderer is unable to provide one or other of the above documents, it may prove its economic and financial capacity by any other document which the Contracting Authority considers appropriate. In any case, the Contracting Authority must at least be notified of the exceptional reason and its justification. The Commission reserves the right to request any other document enabling it to verify the tenderer's economic and financial capacity.

#### **4.2.4. Technical and professional capacity criteria and evidence**

##### **A. Criteria relating to tenderers**

Tenderers (in case of a joint tender the combined capacity of all members of the group and identified subcontractors) must comply with the criteria listed below. The evidence must be provided only on request.

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

- **Criterion A1:** The tenderer must prove experience in the field of regional innovation policies in Europe and Latin America

**Evidence A1:** the tenderer must provide references for at least 5 projects delivered in this field in the last five years (including at least 2 projects in Latin America and at least 2 projects in Europe) with a minimum value for each project of € 250 000.

- **Criterion A2:** The tenderer must prove experience in the field of territorial/cross-border cooperation initiatives and programmes

**Evidence A2:** the tenderer must provide references for at least 3 projects delivered in this field in the last five years with a minimum value for each project of € 250 000.

- **Criterion A3:** The tenderer must prove capacity to work in English and Spanish

**Evidence A3:** the tenderer must provide references for at least 3 projects delivered in the last three years showing the necessary language coverage.

- **Criterion A4:** The tenderer must prove capacity to draft reports in English and Spanish.

**Evidence A4:** The tenderer must provide two documents of at least 10 pages (report, study, etc.) respectively in English and Spanish that it has drafted and published or delivered to a client in the last two years. The verification will be carried out on 5 pages of the document.

- **Criterion A5:** The tenderer must prove its capacity to work in Latin America

**Evidence A5:** the tenderer must provide references for at least 3 projects delivered in Latin America during the last three years.

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

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

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

**B1 - Project Manager:** At least 10 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 (at least € 250 000) and coverage (geographical scope at least half of the one subject to this call for tender), with experience in management of team of at least 5 people.

**Evidence:** CV

**B2 – Expert(s) in cross-border cooperation in Europe:** Relevant higher education degree and / or 5 years' professional experience in the field of cross-border cooperation, including practical knowledge of EU cross-border cooperation initiatives and programmes.

**Evidence:** CV

**B3 – Expert(s) in regional development and innovation policies in Europe:** Relevant higher education degree and / or 5 years' professional experience in the field of innovation for local and regional development in Europe, including sound and practical knowledge of RIS3 principles and implementation and SME/clusters support schemes.

**Evidence:** CV

**B4 - Expert(s) in regional development and innovation policies in Latin America:** Relevant higher education degree and / or 5 years' professional experience in the field of regional development and innovation policies in Latin America, including experience of working with governments or public authorities in Latin America.

**Evidence:** CV

**B5 – Language quality check:** At least 1 member of the team should have native-level language skills in English or equivalent and at least 1 member of the team should have native-level language skills in Spanish or equivalent<sup>6</sup>, as guaranteed by a certificate or past relevant experience.

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<sup>6</sup> At least C1 level in the Common European Framework of Reference for Languages

**Evidence:** a language certificate or past relevant experience.

### **4.3. Award criteria**

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

- **Quality of the proposed methodology** (50 points - – minimum threshold 50%) in terms of completing the assignments laid down in the tender specifications, to include in particular:
  - presentation of the overall working method and capacity to liaise and cooperate with all the relevant stakeholders,
  - proposal for an appropriate programme exchange concept, with a relevant mix of working meetings, training activities and study visits including the EU Commission;
  - criteria-based identification of potential EU regions benefiting from the activities;
  - methodology for conducting the interviews (task 2.3.1)
  - mechanisms to facilitate the exchange of information and good practices and to provide feedback and assessment for the activities and to ensure wide and effective dissemination of the information beyond the specific groups of participants involved and possibly beyond the lifetime of the project.
  - synergies with existing EU initiatives in this field.
  
- **Organisation of the work** (30 points – minimum threshold 50%)

This criterion will assess how the roles and responsibilities of the proposed team and of the economic operators (in case of joint tenders, including subcontractors if applicable) are distributed for each task. It also assesses the global allocation of time and resources to the project and to each task or deliverable, and whether this allocation is adequate for the work. The tender should provide details on the allocation of time and resources and the rationale behind the choice of this allocation.

- **Quality control measures** (20 points – minimum threshold 50%)

This criterion will assess the quality control system applied to the service foreseen in this tender specification concerning the quality of the deliverables, the language quality check, and continuity of the service in case of absence of the member of the team. The quality system should be detailed in the tender and specific to the tasks at hand; a generic quality system will result in a low score.

Tenders must score minimum 50% for each criterion and minimum 50% in total. Tenders that do not reach the minimum quality thresholds will be rejected and will not be ranked.

#### **4.4. Ranking of tenders**

The contract will be awarded to the most economically advantageous tender, i.e. the tender offering the best price-quality ratio determined in accordance with the formula below. A weight of 60/40 is given to quality and price.

$$\text{score for tender X} = \frac{\text{Cheapest price of tender X}}{\text{Price of tender X}} \times \begin{matrix} \text{price} \\ \text{weighting} \\ (40) \end{matrix} + \frac{\text{total quality score (out of 100) for all award criteria of tender X}}{100} \times \begin{matrix} \text{Quality} \\ \text{criteria} \\ \text{weighting} \\ (60) \end{matrix}$$

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

### **5. ANNEXES**

- (1) Declaration of honour