



CALL FOR TENDERS

Intelligent Cities Challenge

EASME/2019/OP/0016

TENDER SPECIFICATIONS

Open Procedure

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Intelligent Cities Challenge

1. TECHNICAL SPECIFICATIONS

1.1. INTRODUCTION

The Executive Agency for Small and Medium-sized Enterprises (henceforth "EASME" or "the Contracting Authority")¹, acting under the powers delegated by the European Commission, is launching this invitation to tender for the Intelligent Cities Challenge (henceforth ICC).

As it was indicated by the work of the "Strategic Policy Forum on Digital Entrepreneurship"², the cities and regions can be used as enablers for smart growth and industrial transformation. Based on this recommendation the European Commission has published the "Blueprint for cities and regions as launch pads for digital transformation"³ that studied EU model cities which constitute outstanding examples of digital transformation through the use of the following key elements: 1. Leadership and collaboration for smart governance of the local digital ecosystem, 2. Digital skills and entrepreneurship 3. Access to data and technologies for applied solutions to local challenges 4. Key infrastructures and investments.

To apply and scale up these strategic recommendations and findings in more EU cities, the European Commission launched the Digital Cities Challenge (<https://www.digitallytransformyourregion.eu/> and henceforth DCC). DCC is an initiative of coaching and facilitation to help 41 cities develop and implement strategies for smart growth and industrial transformation. During DCC, the cities received:

1. Access to high-level experts with local and international experience to help cities develop and implement strategic plans addressing economic growth and social welfare.
2. Access to tools allowing cities to develop a clear understanding of what stage of digital maturity their city can currently claim and where they should be aiming for it to be.
3. Access to unique and innovative training and capacity building sessions for key city staff and representatives.
4. Dialogue with other cities in Europe who have embarked or are in the process of embarking on the same process, in order to exchange ideas, experiences and best practices.
5. Access to European networks, platforms, and dialogue with European policy makers.

The Intelligent Cities Challenge is meant to be the scale up and continuation of the work done so far in a manner that is elaborated throughout the tender.

Legal basis

The call for tenders is based on 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

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

² https://ec.europa.eu/growth/industry/policy/digital-transformation/strategic-policy-forum-digital-entrepreneurship_en

³ https://ec.europa.eu/growth/content/blueprint-cities-and-regions-launch-pads-digital-transformation-0_en

Enterprises and small and medium-sized enterprises (henceforth "COSME") (2014-2020) and repealing Decision No 1639/2006/EC. More particularly, it is based on Commission Implementing Decision of 5.12.2018 "on the adoption of the Work Programme for 2019 and the financing for the implementation of the Programme for the Competitiveness of Enterprises and small and medium-sized enterprises" C(2018)8098 final.

1.2. BACKGROUND INFORMATION AND CONTEXT

Cities host 72% of the EU population and are the economic engine of the EU, contributing to two third of its GDP. As centres of economic activity, employment and innovation, cities have a vital role to play when it comes to promoting smart, sustainable and inclusive growth and tackling economic, environmental and social challenges.

Internationally the Sustainable Development Goals⁴, Habitat III⁵, the New Urban Agenda⁶, all recognise the role of cities as key to tackle modern day challenges and risks. Since the start of its mandate, the Juncker Commission has worked to mainstream sustainable development in its policies and has already laid the ground for the next generation of sustainable policies: from the European Pillar of Social Rights, and the Strategic Engagement for Gender Equality; to Circular Economy package, the Urban Agenda for the EU and Nature Action Plan, amongst others.

By supporting the implementation of the New Urban Agenda since 2016, the EU has also reinforced its involvement to make Sustainable Development Goal 11 and the urban dimension of the 2030 Agenda a priority for the EU Response to sustainable development. This Urban Agenda for the EU is a multi-level governance approach to better position cities and to strengthen the urban dimension in the national and EU policymaking process. In the European policy, the allocation of resources dedicated to Urban Dimension is also arising in the next EU Budget, to be implemented by 2019, in order to clearly focus on Investing in People, Cohesion and Values, Innovation and Digitalisation, as well as on environment and climate action through the new LIFE programme (https://ec.europa.eu/commission/future-europe/eu-budget-future_en).

While economic, social and territorial disparities between EU Member States and between regions persist, the EU's cohesion policy has continuously helped all regions to grow and to reduce divergences across the continent, promoting sustainable development as a horizontal principle. It also supports the implementation of the Sustainable Development Goals (SDGs), leveraging around 650 billion euros during the 2014-2020 period. Going beyond this perspective, many SDGs are also implemented locally thanks to integrated strategies for local development supporting several policy areas. It shall also be considered that € 100 billion of European Regional Development Fund is spent in cities, out of which EUR 15 billion are managed directly by the same cities. This is a proof of the need to work in complementarity and in partnership, so different levels can be involved in designing the best local framework and environment for citizens.

In parallel and over the last few years, it has become obvious to all that the future, the economy, and ultimately the society will be transformed by digital technologies. In the current EU budget, significant funding has been allocated to the development and testing of digital solutions, including through the "Internet of Things Large Scale Pilots" and the "Smart City lighthouse" projects. These have been supporting cities in tackling current and future

⁴ https://ec.europa.eu/europeaid/policies/sustainable-development-goals_en

⁵ <https://unhabitat.org/habitat-iii/>

⁶ <http://habitat3.org/the-new-urban-agenda>

challenges, in becoming more resource efficient, while also delivering better public services for citizens. For the EU's next Framework Programme for Research&Innovation (R&I), the 'Global Societal Challenges and Industrial Competitiveness' pillar of the Horizon Europe proposal⁷ (with the proposed budget allocation of €52.7 billion) contains a cluster 'Climate, Energy and Mobility'. This section includes a sub-cluster 'Communities and cities' that aims to respond to a key challenge of significantly increasing the overall energy and resource efficiency as well as climate-resilience of Europe's cities in a holistic fashion, targeting the building stock, energy systems, mobility, climate change, as well as water, soil, air quality, waste and noise.

The revolutionary potential of emerging technologies, such as Artificial Intelligence, data analytics, Internet of Things, blockchain, offers to cities unprecedented opportunities for innovative business models, new market creation and addressing societal challenges, climate change, resource efficiency and a circular economy. All around, the EU cities are taking bold steps in order to reassure better life for their citizens and economic growth while becoming more intelligent and on the same time sustainable and resilient.

Previously through the Digital Cities Challenge⁸ the European Commission empowered 41 European cities to become Digital and achieve strategies for smart growth and industrial modernisation through the use of advanced technologies.

Following a common methodology, the cities put their local ecosystems together in order to conduct local workshops on assessing their digital state, setting a common vision and ambition, structure a digital strategy, commit on concrete actions and monitor the implementation. After each key milestone, all cities would come together in Seminar Academies, to exchange, conduct peer reviews, learn, get inspired and network. There each city is represented by their assigned City Lead Expert (a consultant who overviews the progress and coaches the city throughout the challenge and is responsible of the city following the methodology), one representative from the municipality (mainly being a Chief Technology/Digital Officer), a business representative (ex. chamber of commerce) and an academic.

The milestones are also connected to reporting of the activities or enhancing the support to the cities, which happens for example with the assignment of thematic experts on the issues that cities have identified their key objectives and actions (ex. Artificial Intelligence (AI), Data, Digital transformation of key sectors of the economy such as tourism, etc.)

The political commitment was proven to be an important element for the progress of the participating cities. The mayors came together in the Mayors Summit that took place in the Committee of Regions premises in December 2018, and committed by signing the Declaration of Cooperation for Smart Growth and Digital Transformation (available on the DCC website). The commitment is mainly about maintaining the network strong, establish concrete collaborations and bring their ideas together claiming European cross boarder funding.

The Digital Cities Challenge (DCC) is finishing in July 2019 and the Intelligent Cities Challenge (ICC) will be its successor. Its goals will be to:

- ✓ reinforce and expand the existing network;
- ✓ improve, expand and spread the use of the methodology already developed in the Digital Cities Challenge;
- ✓ expand the scope of Digital Cities Challenge including other emerging technologies;

⁷ https://ec.europa.eu/commission/sites/beta-political/files/budget-may2018-research-innovation_en.pdf

⁸ <https://www.digitallytransformyourregion.eu/>

- ✓ create a dialogue and cooperation with urban centres less or more advanced digitally (mentors and mentees) but of strategic importance and located beyond the EU;
- ✓ align the scope of the Intelligent Cities Challenge with key modern day challenges, the EU and global agenda focusing on climate action, decarbonisation, economic, environmental and social sustainability.

ICC should build on the methodological tools of DCC, improve and expand their scope. ICC should put the political engagement of local municipalities and stakeholders high on its agenda to ensure implementation of the strategies and actions conceived through ICC, or review of the strategies and advancement on their implementation that were conceived during DCC.

1.3. GENERAL AND SPECIFIC OBJECTIVES

EASME wishes to enter into a service contract to sustain, reinforce and expand the existing network of Digital Cities and drive them towards the Intelligent Cities Challenge.

The Intelligent Cities Challenge will be the scale up of the Digital Cities Challenge initiative.

The **overall objective** is to support, reinforce and expand the network of the cities that participated in DCC. ICC will support EU cities to build ecosystems of smart growth, harnessing the benefits of advanced technologies while prioritising the economic growth, the wellbeing of the citizens, and the environmental and social sustainability. Cities will be supported to act as levers for industrial modernisation and the transition to circular economy, clean technologies and resource efficiency. The cities as authorities should also lead towards decarbonisation by example boosting through procurement and urban planning the uptake of alternative low-carbon means of transportation, efficient and more sustainable logistics, transformation of their building stock and testing of innovative building solutions etc. In the end of ICC, the participating cities need to have started already taking concrete actions towards this direction on a local level, and with the collaboration of all local stakeholders, and jointly claiming funds for the implementation of cross border investment and city development projects.

Its **specific objectives** are:

- Sustain and reinforce the existing network of DCC by continuing to support its cities with advisory services and networking opportunities, monitor the progress done, support the implementation of the actions defined during DCC and the update of their strategies, retain the Mentor Cities that wish to continue being part of the initiative and propose new ones.
- Expand the network of DCC with about 50 new European cities (or groups of neighbour cities participating jointly as one, or islands etc.) that will be chosen by an open call for expression of interest and selected through a robust assessment that guarantees high-impact and strong commitment.
- Develop an international dimension by including in the network 10 cities outside the EU on the status of Mentors and Mentees. Propose and implement a methodology of cooperation with them.
- Improve, expand and spread the methodology and city assessment tools, already developed in the Digital Cities Challenge.
- Expand the scope of Digital Cities Challenge by including other advanced and non-digital technologies, such as biotech (especially in relation to waste and water treatment), nano, bio-based and smart materials (as when it comes to construction), drones etc.

Prioritize technologies that are identified as key by EU policy such as ethical and trustworthy Artificial Intelligence, cybersecurity, blockchain, open data, sustainable smart mobility, etc.

- Align the work of the Intelligent Cities Challenge with EU policy and global challenges, focusing mostly on environmental and social sustainability, decarbonisation, the Sustainable Development Goals etc. Give emphasis on these priorities in the call for expression of interest and support the cities throughout ICC to set and reach ambitious goals towards the accomplishment of these challenges through the use of advanced technologies.
- Succeed the matchmaking of cities in order to build synergies and proceed to joint investments for the implementation of cross border high-tech urban transformation projects. In addition, the contractor should facilitate cities with common needs to proceed to collective procurement of services (ex. data visualisation platform) or equipment (ex. self-driving vehicles, electric bikes, and building materials for energy collection, green roof interventions etc.) in order to create economies of scale beneficial to them.
- Empower cities in order to take concrete actions in line with the general objective of ICC.
- Build on synergies with the existing initiatives on smart cities, namely the European innovation partnership on smart cities and communities (EIP-SCC) which is an initiative supported by the European Commission that brings together cities, industry, small business (SMEs), banks, research and others.

1.4. TASKS AND GEOGRAPHICAL SCOPE

1.4.1. Tasks

To meet the objectives mentioned in section 1.3 and with reference to the context described in section 1.2, tenderers are asked to provide an offer that covers as a minimum the following tasks:

- Propose a "modus operandi" that will review the methodology and self-assessment tool and Key Performance Indicators (KPIs) used during the DCC and will propose ways of improving and expanding them to better serve the goals of ICC. The focus of this should be to: increase user-friendliness and better accessibility to any EU city or citizen; increase transparency of the indicators used and the results produced; expand on a way that can follow up on the progress of the cities till the end of the DCC. The tools should allow any city to use them, and benchmark itself, as well as measure transformation (ex. compare results from cities in different years). The updated methodology will be used in the course of the Intelligent Cities Challenge.
- Review the progress and engagement of the 41 cities participating in DCC based on the reporting of the DCC contract and consultation with the cities.
- Expand the network by including at least 50 new EU cities (selected through an open call for expression of interest) and 10 extra-EU ones. Group the cities to facilitate better cooperation, exchange and delivery of advisory services.
- Deliver field advisory services in the participating cities in the course of ICC and assign them experts. Combine the field advisory services with international meetings among the different city teams (meaning representatives of public administration, businesses, academia and the civil society) aiming at exchanging, networking, training and learning.

- According to the needs, arrange specific ad-hoc meetings such as field visits between cities, meetings among mentors and mentees etc.
- Organise meetings of the Mayors of the participating cities to ensure political commitment.
- Organise a Final High Level conference to celebrate the lessons learnt and shape the vision and strategy for the future.
- Propose and implement a communication and dissemination plan from the beginning of the project. Manage and update the existing website: www.digitallytransformyourregion.eu (all necessary credentials and a technical handover will be provided by EASME/European Commission services when the contract starts). Create and propose a complete branding concept for ICC with all the necessary items accompanying it for the use from the Commission, the cities, and general promotion and dissemination. Create a guide for cities on how to promote their participation in ICC.
- Assess on a frequent basis the participation of cities and implement risk mitigation actions in case of poor participation.

It is brought to the attention of the tenderers that the contract may be subject to a renewal (see section 1.8). All task mentioned above and guidelines given in section 1.6 below are also applicable to the renewal period.

1.4.2. Geographical scope of the tasks

The current DCC network of cities will be enlarged with new EU and extra-EU cities (which may also be from non-COSME countries⁹). Partnerships with cities outside the EU will be initialised in view of benefitting both EU and extra-EU cities and of jointly acting in the accomplishment of global climate and environmental targets through the use of Advanced Technologies. The advisory services will be delivered locally and physically, to all cities participating in the ICC network. The events and meetings can occur in any participating city. In particular, for the benefit of the participating cities, they can occur also outside the EU (ex. study visits and international meetings of participating cities in an extra-EU city leading in sustainable growth through advanced tech).

1.5. INPUT BY THE CONTRACTING AUTHORITY

All information on DCC, including the [methodological tools](http://www.digitallytransformyourregion.eu), is publically available at <https://www.digitallytransformyourregion.eu/>. The ICC will take over the website of DCC from the former contractor and make sure to maintain all content available on the website in a manner that distinguishes the 2 initiatives as the one being the upscale of the other.

After the signature of the contract, the contracting authority will make available all city reports and contractual reports (Inception, interim, Final) that the contractor of the “Digital Cities Challenge” prepared and give clarifications if necessary on the previous work done.

No assessment of the current DCC is required to the tenderer, who shall focus its offer on how the tenderer plans to evaluate and update the existing methodology.

⁹ <https://ec.europa.eu/docsroom/documents/34263>

1.6. GENERAL GUIDANCE ON METHODOLOGY

As mentioned above in section 1.4.1, the contractor should carry over the following tasks and organise them in the following 4 work packages:

➤ **Work package 1: Review and update of the methodology and tools of the Digital Cities Challenge and review of the participation of the 41 cities.**

Task 1.1: Review and update of the methodology and tools of the Digital Cities Challenge

The contractor will review the methodology (namely Self-Assessment tool, Key Performance Indicators (KPIs), digital trajectory, way of delivering of advisory services) used during the DCC and propose ways of improving, simplifying when necessary, increase the efficiency and expanding them. In addition, the contractor should propose the expansion of the methodology and define the nature and methodology of the advisory support to be given to the cities already participating in the Digital Cities Challenge and to the new cities to be included in the course of the contract.

No assessment of the Digital Cities Challenge methodology is expected in the tendering process.

Task 1.2: Review the progress and engagement of the 41 cities participating in DCC

The contractor will review the progress, engagement and actions taken by the 41 cities participating in DCC. The contractor shall proceed to consultation with the cities and their working city teams (including staff from the municipality, the academia and the businesses) established during DCC and propose to EASME/the Commission which cities should continue receiving advisory support during the ICC, which cities do not have the willingness or the resources to continue, which DCC cities could share expertise as mentors during ICC, and which of the Mentors cities from DCC should continue in ICC with the same role.

Note: In case of renewal, the progress and engagement of the cities participating in the ICC network will be assessed. The cities that participated in the Digital Cities Challenge will not be supported anymore, but can continue being part of the network at their own resources.

➤ **Work package 2: Reinforcement and expansion of the current network of cities**

Task 2.1: Expansion of the current network with a call for expression of interest

The contractor will prepare a call for expression of interest in order to expand the network of the cities that participated in DCC by at least 50 more among those located in the EU Member States. The contractor should promote the call in an inclusive way to all EU Member States. Support should be given to cities that wish to apply through the use of a helpdesk, specifically set to address possible questions on the call in English within a maximum of 6 working days, and a live and recorded webinar (at least in English with subtitles) presenting the key features of the call and success cases and experience of cities already in the network and with a live “question and answer” session. The call for applications should encourage and accommodate neighbour cities and towns coming together as a consortium, cities in outmost regions, cities and towns located in islands that wish to come together with a common application.

The call should attract cities of medium maturity in terms of adoption of advanced technologies, but with high unleashed potential. The call for expression of interest will provide comprehensive information about the potential benefits of using advanced technologies for industrial modernisation (transition to clean tech, circular economy, resource efficiency, etc.), economic growth and job creation.

The call should be able to clarify the following: the different stakeholders of the city (businesses and academia) participating in the application process; if there is proven support from the city administration and leaders to commit to the participation; if the city has strong willingness to tackle modern day challenges through the use of advanced technologies as enablers for smart growth and improve their social (employment, skills, inclusivity, refugee integration, tackling of housing related problems etc.) and environmental (circularity, climate action, clean tech, greener and automated mobility, smart waste management, renewable energy etc.) sustainability.

The contractor should develop, before the launch of the call, a robust methodology to evaluate the applications in an inclusive manner taking into consideration the commitment and the potential of each city, as well as geographical balance. The cities to be selected should show a clear understanding of the objectives and thematic priorities of the Intelligent Cities Challenge.

The Terms of Reference and the evaluation methodology of the above mentioned call, their content and features, must be agreed with EASME and the Commission. In particular, the contractor must ensure compliance with Commission's basic principles (e.g. equal treatment, competition, non-discrimination, transparency).

Task 2.2: Development and implementation of a communication strategy for the call for applications

In order to assure that the call will reach out to a broad audience of EU cities, the contractor will develop in advance and present to the Commission services and EASME a communication strategy for the dissemination of information about the call in all EU Member States, including islands and outmost regions. The strategy shall, inter alia, address to other EU institutions (in particular seeking for cooperation with DG REGIO), the Committee of the Regions, the European Economic and Social Committee, propose direct contacts at central governments, national and regional representations in Brussels, city associations and other European associations/networks bringing together local and regional authorities (e.g. Council of European Municipalities and Regions) as multipliers.. It should include publications in relevant press, use of contractor's and the Commission's network of stakeholders, the web and social media campaigns with specific attention to targeting local and regional actors etc.

The contractor will implement the communication strategy as soon as the Commission services and EASME approve it and it will be implemented till the deadline for the submission or extended deadline if needed to reach adequate number of expressions of interest by cities.

Task 2.3: International dimension

The contractor will seek strategic partnerships with 10 cities located beyond the EU, all over the world and in regions of strategic - from geo-political, urban transformation or technological perspective - importance for the EU (the Contracting Authority will provide further guidance in the inception phase). For this purpose, the contractors will identify and propose to the Commission services and EASME, a minimum of 15 and a maximum of 20 cities of strategic importance to integrate the Intelligent Cities Challenge in a way that is beneficial to both the EU cities and themselves and that fosters knowledge exchange. Half of them should be leaders in the areas that ICC is covering and take over the role of Mentors. On the other side, the contractor should facilitate partnerships with cities outside the EU in the view of common action in the accomplishment of global climate and environmental targets through the use of Advanced Technologies.

The tenderer shall elaborate on the methodology to follow in order to expand the ICC partnership internationally.

The tenderer will demonstrate in its offer how it intends to select the cities (the methodology used, the criteria, the tools, etc.) and how it will gauge their interest in joining the ICC network. In particular, the contractor must demonstrate that the proposed methodology will comply with Commission's basic principles (e.g. equal treatment, competition, non-discrimination, transparency).

The methodology proposed may be refined during the inception phase and must be agreed with EASME and the Commission.

The final list of 10 cities will be decided jointly by the Commission and EASME.

Task 2.4: Grouping of cities

The contractor should suggest a way of grouping and collaboration of the participating cities according to their strategic orientations that could be smart, carbon-neutral industry, environmental sustainability, energy efficiency, climate action, sustainable urban interventions, social sustainability, smart mobility etc. In addition, the contractor may suggest other ways of sub-grouping according to the key technological priorities in order to facilitate exchange, matchmaking and delivery of advisory services.

The contractor will also facilitate exchange and cooperation of cities from the same country or of cities in proximity to foster peer learning and knowledge exchange on common challenges, orientations and use of advanced technologies. The contractor will organise to this aim 2 half-a-day ad hoc meetings per involved country or geographical region (example Iberia peninsula), in case there is a limited number of cities in each country justifying the choice. The contractor will be responsible for the organisation of these meetings (providing the venue, logistics, catering, working material and liaison with the participants) and for covering the travel expenses (tickets and accommodation if needed) of up to 4 people of each city team (where by team it has to be intended the assigned expert, representatives of public administration, businesses, academia and if necessary other stakeholders). The contractor shall propose the agenda of these meetings and a list of possible speakers (selected on the basis of their expertise in the key topics of interest for the concerned cities) to the EASME/Commission services for approval. The contractor will cover the travel (and accommodation costs, where needed) of at least 5 external speakers per meeting. In addition, the contractor will also cover the travel expenses of up to 5 representatives of other cities in the country or region that are not participating in the ICC but could become valuable partners of the network.

➤ **Work package 3: Delivery of advisory support to the cities**

Task 3.1: Advisory services and facilitation for the establishment of an ecosystem of all city's stakeholders

Local and regional stakeholders all have important and complementary roles to play in the process of transformation of cities to intelligent, sustainable and resilient. A non-exhaustive list could include mayors and presidents of regional councils, city managers, CEOs of SMEs, entrepreneurs and founders of start-ups, cluster managers, managers of intermediary organisations, researchers and academics, managers of education and training institutions including schools, journalists, creative and cultural actors, representatives of social partners, investors, citizens and NGOs.

The contractor shall provide advisory and facilitation services to the cities in view to identify and unite the above mentioned key stakeholders in a strong and long-lasting network (or

ecosystem). A way should be found where all important city stakeholders are participating actively in the definition (or update) of the cities' strategies, commonly agreeing to take action in order to implement the defined strategies. In addition, the whole ecosystem should be prepared to act for the upskilling of the workforce and preparation of the future generations of workers and entrepreneurs¹⁰.

To this aim the contractor will deliver field advisory services in the EU participating cities in the course of ICC and assign them experts. Each city will receive one lead expert for a minimum of 45 working days and at least 6 field visits per year. The lead expert will be assisted by at least 2 thematic experts per city, chosen according to the strategic orientations of each city. The thematic experts should also pay working visits to the city at least 3 times each during the contract to conduct preliminary work for supporting these cities.

Task 3.2: Advisory services on the design of transformation strategies based on advanced technologies and their implementation

An in-depth analysis of the maturity level in the adoption of advanced technologies and the existing policy framework shall be carried out for all new participating cities. The analysis shall be based on the updated version of the DCC methodology and it will review the suitability of the existing policies, smart specialisation strategies, actions and initiatives for smart growth and industrial modernisation. This analysis will inform and drive the re-shaping, design and implementation of the city's ultimate strategy and its implementation and monitoring. For the cities that were already part of the Digital Cities Challenge, an analysis of the advancing level of their maturity in adopting advanced technologies should be provided and all the important steps taken to this end. The methodology of this assessment will be developed under task 1.2 (Work package 1). The contractor shall also assess the strengths and potential of the local ecosystems and shall advise and assist the cities in reviewing annually and consolidating their strategies and in implementing them effectively.

The contractor shall advise and facilitate local stakeholders in designing common projects, hackathons and infrastructures, to accelerate access to technologies and data, new business models, skills and talents. Concerning the investments, the contractor shall also clarify and provide technical support in understanding the different funding streams (European, national, regional, private, etc.) and valorise them to finance the transformation process. In order to go beyond the concept of the city as test-bed and pass to full implementation, coaching and advising should also be provided in terms of scaling up examples of other cities, partnering with other cities in or outside the ICC and proceeding to smart procurement decisions that lead to an economy of scale. Following the model of many national initiatives¹¹ the contractor should prepare the framework, the dissemination strategy and some matchmaking events that will help the cities and the economic operators therein based with exporting their solutions outside the EU as to open new markets.

Task 3.3: Facilitation of interregional partnerships collaborations and investments

The field advisory services shall be combined with international meetings among all the different city teams (meaning their assigned experts, representatives of public

¹⁰ To this end, innovative models should be explored and initiatives should take place on this direction. Examples: the knowledge society <https://theksociety.com/#whatistks> or Ecole 42 <https://www.42.fr/>

¹¹ Example Smart City Sweden <https://smartcitysweden.com/>

administration, businesses, academia and if necessary other stakeholders) in order to learn, train on the next steps of the methodology, critically exchange, conduct peer reviews on their actions and network and work jointly on solutions to common challenges (e.g through hackathons). The goals go to 2 directions: each city should start implementing concrete actions in its local level and on the same time the contractor, through the different advisory services and these meetings, should facilitate the creation of interregional collaboration among cities and other cities with similar interests (either sectoral, or related to the use of a specific technology) to find solutions and good practices to share.

Tenderers will have to propose the most adequate number and format (including whether they will be physical meetings, online ones, webinars, etc., or a combination of the previous) of meetings in order to reach the above mentioned goals. Tenderers must justify their choice and explain how they intend to ensure that those meetings will produce concrete collaborations rather than being simple networking opportunities.

The chosen location of such meetings should follow an expression of interest by the city and an evaluation – performed by the contractor - of its capacity to host the meeting and to guarantee the expected results.

As the initiative proceeds, the contractor will support the cities to define and realise cross border investment projects and when necessary support them further (by match-making, arrangement of physical meetings, webinars, assignment of experts, etc.) in order to apply to EU funding for their realisation. The contractor will also be responsible to identify existing partnerships (ex. Smart specialisation platform partnerships) or existing funds (ex. ERDF funds that are not fully utilised by the regions) and orientate and guide the cities to take advantage of them.

The contractor will be responsible for the organisation of these meetings (providing the venue, logistics, catering, working material and liaison with the participants) and for covering the travel expenses (tickets, accommodation if needed) of up to 4 people of each city team. The contractor shall propose the agenda of these meetings to the EASME/Commission Services that will include at least 10 external speakers per meeting for whose travel expenses the contractor will be responsible.

Task 3.4: Performance monitoring and reporting

The contractor will monitor the performance of cities, based on the reviewed methodology that was developed during work package 1. With the help of identified KPIs, the contractor will monitor the actual impact of the actions and initiatives on the local economy, businesses and citizens against the target; the contractor will assess the progress achieved and advise the cities on how to adjust their actions and initiatives in order to reach the objectives of their strategies.

The contractor will regularly report to the Commission services and EASME on the strategies and actions developed, the challenges encountered and in general on the progress made by the cities. The Commission services and EASME together with the contractor will agree on the forms of reporting (regular meetings, written reports, etc.).

The contractor will assess on a 6-month basis the participation of cities; if needed and in agreement with EASME/the Commission, he will implement risk mitigation actions or an elimination process in case of poor participation. The contractor will equally assess the progresses and propose resolving actions in cases of changes in the staff and contact points in the city, problems arising with the implementation of the methodology etc.

Additionally, the contractor shall provide an overall analysis of the progress of each city which took part in this action at the end of the contract. He will collect all the information concerning their initial state and assess major successes, main challenges and solutions developed and he will elaborate individual city reports as well as a final, overall report with practical recommendations on how to make the most of the process of industrial modernisation and use of advanced technologies. These reports will also be subjects of the communication and dissemination plan developed by the contractor.

➤ **Work package 4: communication and dissemination actions**

The purpose of this work package is to disseminate the progress and the outcomes of the strategies and the individual initiatives and actions implemented by the cities. Dissemination of such initiatives may inspire other cities and thus create more "Jobs, Growth, Investment and Competitiveness"¹². The communication objective of this action is to ensure the visibility of the challenge, promote the call for applications and disseminate the ICC's progress and outcomes.

Task 4.1: Communication and dissemination plan

In this regard, the contractor will develop and present to the Commission services and EASME for approval, **a communication and dissemination plan** on the progress and results of the Intelligent Cities Challenge.

The minimum requirements of the communication strategy, upon which the tenderer will have to elaborate in the offer are:

Key target audiences:

- cities participating in the ICC and their representatives in local and regional administrations;
- cities not participating in the ICC that might consider applying for it in the future or would like to access ICC material and methodology and other key stakeholders, such as city managers, chambers of commerce, academia;
- associations/networks bringing together local and regional authorities (e.g. Council of European Municipalities and Regions) as your multipliers and
- citizens, investors, local, national and EU policy makers, to be targeted by cities participating in the ICC.

Key communication message:

Cities have the capacity to drive industrial modernisation and economic growth. The ICC offers the opportunity to bring their local ecosystems together, be part of the European Network and create synergies and cross-border investment projects. Methodology to succeed, good practices to duplicate and potential partners – are ready for cities to use and benefit from.

The above overarching message should be further personalised per target audience by the tenderer, who must make sure that messages speak to cities. Some examples to illustrate this are:

- (i) for cities to participate: *you are true leaders of industrial transformation and economic growth; with the 'Intelligent City Challenge' you can take that one step further to promote your city. Find out how to apply: [insert link to the website],*

¹² https://ec.europa.eu/commission/priorities/jobs-growth-and-investment_en

(ii) for non-participating cities: *become inspired by other cities taking the 'Intelligent Cities Challenge' to promote themselves and attract investment. Find out how: [insert link to the website].*

Messages must be strengthened by using success stories. For social media especially develop messages illustrating benefits for the cities, their local business environment and importantly for their citizens.

An example to illustrate: *Have you ever wondered how smart your city is? ___ [insert name of the city] has boosted its 'intelligence' by taking part in the Intelligent City Challenge. Find out how [insert link to the website].*

Cities' governments are likely to seize this opportunity to promote themselves via the ICC. The contractor must encourage this and prepare an info package with a tool kit including the EU logo, look and feel models in different shapes and colour variations including the #EUinvest and #EUandME hashtag to fit the various communication tools (Newsletters, Websites, Twitter, Facebook, Instagram, LinkedIn, TV, radio, others). It will have to make sure that when cities promote themselves via ICC they should mention the EU patronage and include the EU flag. Corporate hashtags such as #InvestEU and #EUandME should also be compulsory.

The tenderer can also consider the possibility to dedicate promotional campaign funds to cities participating in the ICC. In this case, the tenderer must clearly demonstrate the added value and the effectiveness of the proposed allocation. Moreover, it must develop some cornerstone campaign requirements for cities using such funds e.g. (i) require a minimum percentage of TV, radio, out-of-home advertisement, social media boosting, (ii) require particular target audiences (if appropriate), (iii) require some minimum percentage of reference made to EU support, (iv) require some minimum flagging of EU logo/look and feel. Finally, it must set up a contractual document for the ICC participants, binding them to use the EU logo and toolkit for ICC related communication.

The contractor must also:

- When creating a newsletter mailing list, ensure that data protection policy is applied. The Commission is committed to protecting personal data and privacy. The contractor must collect and further process personal data only in line with Regulation (EU) 2018/1725¹³ on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data (repealing Regulation (EC) No 45/2001). In particular, the contractor will have to make sure that it records personal data processing activities and informs data subjects, via a privacy statement, before starting to process personal data.
- Complement social media posts with ICC branded visuals, GIFs, short videos, etc. Include written or oral statements from representatives of participating cities in social media posts. All social media material should be made available in form of a 'social media toolkit' for campaign ambassadors (cities).
- Include local newspapers and radio spots in media mix, as well as online banners (form of online advertising).
- Importantly, ICC material, including social media posts, should be translated into as many EU languages as relevant. It is therefore recommend to dedicate the necessary budget for high quality idiomatic translation of messages for the promotion campaigns before, during and at the end of the ICC.

¹³ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32018R1725>

Support from DG COMM, DG GROW, EASME and EC Representations in Member States should be looked after, in agreement and following the modalities indicated by the Contracting Authority during the inception phase.

The dissemination plan should run from the beginning of the contract and make use of, namely and not exhaustively, website, newsletters, news items, social media posts and promotion through ads, presence in key city events and other means that will be proposed by the contractor.

Task 4.2: Management of the website

The contractor will maintain and manage the website www.digitallytransformyourregion.eu. All previous material already online should be maintained and new section for ICC should be created clearly showing that ICC is the continuation of DCC. The website should work as a library for all material produced by ICC, good practices, news, events, the methodology used etc. The website should work as the main landing page when news about ICC are published in social media, or disseminated through newsletters, web items etc.

Task 4.3: Guide for cities

The contractor should create and ensure the sharing and implementation of a **guide for cities** on how to promote their participation in ICC on a way beneficial to them, to the network and to the EU through personal, professional and municipal channels but also physical communication in a local level (organisation of local events especially in the context of other international, EU and national actions such as the EU Industry Weeks, the Social Economy Regions Platform etc.) in order to establish themselves as Intelligent Cities and beacons of industrial transformation, environmental and social responsibility etc.

Task 4.4: Participation in intelligent city related events

The contractor will **identify major events at European or international level** that are not organised by the European institutions, and are related to smart, digital and intelligent cities, digital transformation and industrial modernisation of regions and cities and foresee participation on at least 5 per year (13 in total for the 30 months of the contract) including presence of participating cities accompanied or not by a Commission representative. From this contractor's proposal, the Commission will choose the events that it finds most relevant and useful to include for ICC promotion. In those events the cities will present their major activities and their key challenges and solutions developed. The contractor will be responsible for covering the travel and accommodation (only exceptionally and when it is not possible to travel on the same day of the conference) expenses of the participants coming from the participating cities (up to 3 representatives of different cities per event, to be agreed with EASME/Commission).

Task 4.5: Organisation of events and conferences

The contractor will organise a **half day launching event** (100 participants) **of the Intelligent Cities Challenge** in Brussels once all participating cities are selected, to inform European, national and regional policy makers, associations, representations and press on the launching of the initiative and encourage connections and dissemination from an early stage. The contractor will be responsible for identifying the participants, invite and liaise with them, define the agenda of the event, organise and cover the travel expenses of up to 3 speakers, organise the registration, book the venue (in agreement with EASME/Commission) and cover its costs, organise and cover the costs of catering and all logistics related to the event (IT equipment, sound, badges, tags, signposts, etc.).

The contractor will organise **2 high level one-day meetings with the Mayors** or Vice/Deputy

Mayors of the participating cities accompanied by 2 members of their city teams active in the Intelligent Cities Challenge. The first Mayors meeting shall take place in the first year of the contract and the second in the last (third) year in order to confirm the political commitment from in the cities about the Intelligent Cities Challenge. The contractor will be responsible for covering the travel expenses of the Mayors and their teams, up to 2 hotel overnight stays per person depending on the place of origin, the organisation of the agenda, the expenses of up to 5 external speakers and the liaison with all speakers and participants, the venue, the catering, interpretation of up to 6 different languages and any other expenses related to the logistics of the meeting).

Moreover, the contractor will organise a **two-day high level conference** at the end of the contract (400 people) to present the final outcomes, discuss the main lessons learned with policy makers and practitioners and prepare a future strategy. For the organisation of the conference the contractor will be responsible for all logistics, promotional and exhibition material (as proposed by the contractor in its communication plan), travel expenses of up to 40 speakers in addition to 1 representative per participating city to attend the conference. A separate dissemination plan will be developed for this high level conference to make sure that the conference hall is filled with appropriate stakeholders and that all key organisations and services are aware of the event.

All above mentioned events and meetings among the cities should be documented by a photographer, minutes should be taken and graphically consistent reports should be submitted to EASME/the Commission services at the latest 5 days after each event. After approval they should be uploaded on the website and used for dissemination.

The contractor should organise all events while respecting the **guidelines for green procurement**¹⁴ and in a way that is aligned with the environmental sustainability goals of the initiative. Specifically reduce the environmental impact of events by: choosing venues easily accessible by public transport, proposing accommodation options in certified environmentally friendly hotels, proposing travel itineraries using carbon-offsetting flights or trains (instead of flights), proposing green catering (prefer plant-based food, opt for seasonal and organic food and drinks, avoid food waste and single use plastic, and provide reusable cups/bottles/glasses/cutlery/plates), pay attention to the management of waste and place displays to communicate the sustainable arrangements that have been put in place. The contractor should consider when it comes to small supply contracts to reserve the contract for sheltered workshops for disadvantaged persons, women, and long-term unemployed people.

Task 4.6: Branding proposal and production of promotional material

The contractor should create and propose a complete **branding proposal** – based on the Commission / EU logos - for ICC with all the necessary items and tools accompanying it for the use from the Commission, the cities, and general promotion and dissemination. Further guidance will be provided by the Contracting Authority at inception phase. The contractor will be responsible to design, submit to EASME/the Commission services for approval and then produce material for the promotion and dissemination of the Intelligent Cities Challenge throughout the contract duration. The promotional material must include as a minimum a general leaflet on the Intelligent Cities Challenge including the objectives of the project and the participating cities, posters on demand based on the progress of the project,

¹⁴ <http://ec.europa.eu/environment/gpp/pdf/Buying-Green-Handbook-3rd-Edition.pdf>

banners to be used in events, maps of the participating cities, and overall material for the use from the cities (authorities and stakeholders) and the Commission services. Both printed and for the web materials should be foreseen, including an e-kit for the communication activities of the cities and the Commission services.

Printed communication materials shall use eco-friendly design and printing. Please consider the full life cycle of produced materials (ex. possibility to recycle banners into bags.) Consider limiting the distribution of gadgets and gifts (if applicable) to a minimum number of eco-friendly produced items.

IMPORTANT: The tender should provide details on the allocation of time and human resources and the rationale behind the choice of this allocation. Details should be provided as part of the technical offer.

1.7. PERFORMANCE AND QUALITY REQUIREMENTS

The following list shows the expected results in concise and approximate terms, so as to give a general idea of what will be requested from the contractor.

- Development of local capacity in the use of advanced technologies aiming at the transformation of the industry into clean, sustainable and eco –friendly and of the cities into intelligent, sustainable and resilient.
- Establishment and reinforcement of pan-European networking of cities participating in the ICC.
- Mobilisation of all relevant local stakeholders and establishment of a local ecosystem.
- Clear demonstration of progress made by the participating cities by the end of the project.
- Drafting of a final, overall report about the action performed and the challenges faced along the way together with practical recommendations how to tackle such obstacles.
- Drafting of a final report that can also be used as a guide for cities that did not participate in the ICC on how they can use the methodology developed in order to use advanced technologies and achieve industrial transformation, sustainability and resilience while becoming intelligent.

The tenderer should identify – and include in the offer - a clear set of KPIs, able to measure in the course of the implementation the above mentioned expected results, and set performance targets for each of them. KPIs may be revised in the inception phase in agreement with EASME/Commission.

For what concerns the Communication activities, however, the followings are the minimum KPIs the contractor must measure in order to fulfil the Commission communication evaluation process:

Impact (behavioural shift in real life):

- An estimate of a relevant investment increase as an effect of the ICC promotion
- An increase of best practice transfer occurring between cities following the ICC promotion.

Results (responses by audience):

- Social media: n° of engagements (likes, shares, etc)
- Press: N° of media items published
- Website: N° of downloads/usefulness of page
- Publications: Usefulness of publication

Output (n° of audience reached):

- Social media: N° of posts / tweets, N° of reach (Facebook) / impressions (Twitter)
- Press: N° of online views of media
- Website: N° of visits
- Publications: N° of readers

1.8. STARTING DATE OF THE CONTRACT AND DURATION

It is expected that the contract is signed approximately in the 2nd half of 2019.

The contract shall enter into force on the date on which it is signed by the last contracting party provided both parties have already signed it. The duration of the tasks shall not exceed 30 months from that date. The execution of the tasks shall not start before the contract has been signed. Work will follow the timetable detailed below.

The contract may be renewed once for additional 30 months, depending on the future needs and on the budget availability. More details on the tasks and methodology for the renewal period are given in section 1.6.

1.9. VALUE OF THE MARKET

The estimated maximum amount for the execution of all the tasks referred to in this call for tenders is EUR 7 500 000 including all charges and expenses..

The estimated maximum amount for the possible renewal is EUR 7 500 000 including all charges and expenses.

1.10. PLANNING, OUTPUTS AND DELIVERABLES

The contractor must provide the required reports and documents in accordance with the conditions of the draft service contract. When requested in the contract the reports and documents will accompany the invoices for payments.

Each report or document will be submitted in electronic format compatible with Word or Excel or in other formats previously agreed with the EASME and must be in English.

The contractor must ensure that all reports under the contract are drafted in professional/high-quality English using a clear, concise, understandable, user-friendly language. Deliverables for publication (online and/or printed) will be of the highest linguistic quality and will have been edited and proofread by a native speaker or equivalent.

All reports should be consistent in style (headings, margins, citations, bibliography, etc.) and contain a short Executive Summary. Once adapted according to input from EASME and the Commission, the reports should be delivered in publishable quality, ready for exploitation. It will remain contractor's responsibility to ensure a properly application of quotation and the verification of improper re-use of existing material.

Together with the deliverables, the contractor shall also hand over all source material (including all access keys and a technical handover of the website) and documentation on a USB stick or other equivalent digital medium.

List and description of deliverables

Throughout the project implementation, the contractor shall regularly report to the Contracting Authority.

Apart from the Interim and Final Technical Reports described in sections 1.10.1 and 1.10.2 below (which must also be provided with the same modalities in case of renewal), the contractor must provide:

- **An inception report**, detailing the approach and first working assumptions (including a more detailed methodology work plan). The methodology will be agreed between the contractor and EASME/Commission. In case of renewal, a revised and updated inception report will be delivered, with the work plan for the period of the renewal.
- **Minutes of all meetings held with EASME** and Commission (where applicable), namely: the inception meeting, 3 coordination meetings, the final project meeting and all progress meetings. Minutes and presentation material will be submitted within 5 working days after the meeting is held. Minutes shall be approved by the Contracting Authority. In case of renewal, minutes of all meetings held with the Contracting Authority during the renewed period must also be provided following the same modalities.
- **The following deliverables (unless differently instructed, the same deliverables are expected to be delivered for the renewed period):**

Work package 1 (by month 2)

- 1 updated methodology.
- Review of progresses and selection of the DCC participating cities that should be part of the Intelligent Cities Challenge.

Work package 2 (by month 3)

- Organisation of and methodology for the call for expression of interest to enlarge the cities network.
- 1 call for expression of interest published.
- Facilitate the interested cities to apply (ex. make helpdesk available, webinars, promote through multipliers etc.).
- Selection of 50 new cities following the call for expression of interest.
- 1 communication strategy for the call for expression of interest.
- Running of a communication campaign EU wide for the call for expression of interest.
- Methodology for the selection of the international (extra-EU) cities.
- Selection of 10 international cities that may participate in the Intelligent Cities Challenge as mentors or mentees.

- Grouping of cities according to their strategic orientations and sub- grouping according to the key technologies used by the cities in order to facilitate exchange, matchmaking and delivery of advisory services.
- 2 ad-hoc meetings among groups of cities from the same country or in proximity.

Work package 3

- Advisory services to help the cities designing, revisiting and implementing strategies for achieving industrial modernisation and becoming intelligent through the use of advanced technologies.
- At least 3 field visits by the experts to each participating city.
- 1 in-depth analysis based on consolidated methodology of the maturity level in the adoption of advanced technologies, the strength and potential of the local ecosystem and the existing policy framework per each new selected city.
- 1 analysis per each city already part of the Digital Cities Challenge on the advancing of their maturity level.
- Advisory services and technical support to local stakeholders in designing common projects and infrastructures, to accelerate access to technologies and data, new business models, skills and talents.
- Technical support in understanding the different funding streams available (European, national, regional, private, etc.).
- Matchmaking events in order to create interregional networks and collaboration among cities sharing similar interests, successful initiatives on the use of advanced technologies and good practices to share.
- Peer reviews and peer learning meetings between the participating cities that have common strategic orientations and interest in using the same advanced technologies.
- Regular monitoring and reporting of the performance of all ICC cities.
- Reporting to the Commission services and EASME on the strategies and actions developed, the challenges encountered and in general on the progress made by the cities.
- Assessments every 6 months on the participation of cities and update of the risk mitigation action plans.

Work package 4

- 1 communication and dissemination plan on the progresses and results of the Intelligent Cities Challenge.
- 1 communication and dissemination campaign and regular campaign reports (measuring the impact of the campaign).
- Animation of the existing DCC website.
- 1 branding strategy for ICC.
- 1 guide for cities on how to promote their participation in ICC.
- Identification and participation in at least 5 major events at European or international level per year.
- 1 half day launching event of the Intelligent Cities Challenge in Brussels.
- 2 high level one day meetings with the Mayors or Vice/Deputy Mayors and 2 representatives per city to ensure political commitment from the cities.
- 1 two-day High Level conference at the end of the contract (400 people).

- 1 feedback report of each of the events organised and attended.
- Promotional material and 1 eKit.
- 1 individual report per each participating city and 1 overall report analysing the progresses of cities.

Meetings

The contractor will participate with EASME/ the Commission in at least the following meetings: 1 inception meeting; 3 coordination meetings, 1 final project meeting and regular meetings (exact number, modalities and time schedule will be defined during the inception phase, but should be regular and possibly monthly or bimonthly) to assess the progresses and key deliverables/milestones. The meetings will be held in Brussels and organised by the Contracting Authority at EASME's premises (or alternatively if appropriate at other premises of the European Commission). In case of renewal, during the renewed period, the same number of meetings and with the same modalities will be held.

The above meetings may be replaced by video/teleconferencing upon explicit agreement with the Contracting Authority. Video/teleconferencing are also to be envisaged in addition to the above meetings on the basis of specific needs and the progress of the work.

In addition to the above, ad-hoc meetings may be convened by both contractual parties whenever deemed useful or necessary.

1.10.1. *Intermediate outputs and deliverables*

The interim technical report shall include at least the following:

- Aims and objectives of the activities performed;
- Description of the work performed, results, outcome and impact;
- List of "interim" deliverables and their status (those developed within the period covered by the interim report);
- Changes/delays with respect to the original plans; justification for changes and measures taken to compensate for any possible delay in the schedule;
- Issues encountered and corresponding corrective actions proposed;
- Tasks to be performed in the remaining contract period with a corresponding timeline;
- The progresses measured on the basis of the KPIs for each participating city and the initiatives that each of the participating cities has undertaken;
- Awaited risks and mitigating measures.

The interim technical report shall not exceed 50 pages, annexes excluded.

EASME will comment on the report within **30 calendar days**.

The same applies to the renewed period.

1.10.2. Final outputs and deliverables

Building on the interim technical report (see 1.10.1), the final technical report shall include all the elements specified in the sections 1.10 "Planning, outputs and deliverables" (see also Section 2.1.1. "Final report") and elaborate at least on the following:

- Aims and objectives of the activities performed;
- Description of the work performed, results, outcome and impact;
- List of final deliverables (the final version of all deliverables actually delivered during the implementation of the project);
- Issues encountered and corresponding corrective actions proposed;
- Progresses measured on the basis of the KPIs for each participating city and the initiatives that each of the participating cities has undertaken;
- Evaluation of the performed work (on the basis of the performance indicators);
- Suggestions for future initiatives and follow-up actions. The contractor must ensure that the recommendations are clear, concise and operational.

The final technical report shall not exceed 50 pages, annexes excluded.

EASME will comment on the report within **30 calendar days**.

The same applies to the renewed period.

Timetable (months/weeks/days)	Meetings	Actions/Deliverables
Reference date		Date of signature of the contract
Reference date + 1 week	1° meeting with the European Commission / EASME: Inception meeting	The inception meeting will ensure that the contractor has a clear understanding of the terms of the contract and the implementation modalities.
Reference date + 1 Month		Submission of Inception report on the proposal of implementation of the contract

Month 1-29	Monthly or bi-monthly progress meetings with EASME/the Commission services. Meetings among cities.	The aim is to discuss the ongoing progresses, the provided advisory services to the cities, dissemination and reporting tasks and to take stock and agree on upcoming meetings and events among cities and stakeholders.
Month 2		Updated methodology (WP1 task 1) Review and selection of the DCC cities (WP1 task 2) Launch of the call for expression of interest (WP2 task 1)
Month 3		Selection of new cities based on the call for application and selection of international cities. Grouping of cities.
Month 4	2° meeting with the European Commission / EASME: Coordination meeting	The aim is to discuss and to check that the planned work has been performed on schedule and to agree – if needed – on adjustments to be made to the remaining work.
Reference date + 4 Months		Submission of the 1 st interim report Submission of the invoice for 1 st interim payment (30%)
Month 4		Launch event (WP4 Task 4.5)
Month 8 (+-1 month depending on practical matters)		1 st Mayors' Meeting
Month 12	3° meeting with the European Commission / EASME: Coordination meeting	The aim is to discuss and to check that the planned work has been performed on schedule and to agree – if needed – on adjustments to be made to the remaining work.
Reference date + 12 Months		Submission of the 2 nd interim report Submission of the invoice for 2 nd interim payment (20%)
Month 20	4° meeting with the European Commission /	The aim is to discuss and to check that the planned work has been performed on schedule and to agree

	EASME: Coordination meeting	– if needed – on adjustments to be made to the remaining work.
Reference date + 20 Months		Submission of the 3 rd interim report Submission of the invoice for 3 rd interim payment (20%)
Month 26 (+-1 month depending on practical matters)		2 nd Mayors' Meeting
Month 30		Final High-Level Conference
Month 30	Final project meeting with the European Commission / EASME	The aim is to discuss and to take stock of the work done and to be done to finalise all deliverables and to evaluate the contractor's performance (see performance indicators, Section 1.7)
Reference date + 30 Months		Submission of the final version of the final report and deliverables Submission of the invoice for final payment (balance)

1.10.3. Graphic requirements

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

http://ec.europa.eu/dgs/communication/services/visual_identity/index_en.htm

2. CONTENT, STRUCTURE AND GRAPHIC REQUIREMENTS OF THE DELIVERABLES

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

2.1. CONTENT

2.1.1. *Individual city reports, overall report on city progresses and guide for cities*

The publishable individual city reports, the overall report on city progresses and the guide for cities must include:

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

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

2.1.2. *Publishable executive summary*

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

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

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

2.1.3. *Requirements for publication on Internet*

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

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

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. INFORMATION ON TENDERING

3.1. PARTICIPATION

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

It is also open to all natural and legal persons established in a third country which has a special agreement with the Union in the field of public procurement on the conditions laid down in that agreement.¹⁵ States covered by the plurilateral Agreement on Government Procurement concluded within the World Trade Organisation are not included in this call for tenders as the Executive Agencies are not signatories of the Agreement.

In the case of a joint tender (see section 3.4), each member of the group must have access to this procurement procedure.



For British candidates or tenderers:

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

3.2. CONTRACTUAL CONDITIONS

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

3.3. COMPLIANCE WITH APPLICABLE LAW

The tender must comply with applicable environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU¹⁶.

Information about the environmental policy of EASME is provided in Annex 9 to these specifications.

¹⁵ Third countries with a special agreement in the field of public procurement that have been given access to procurement procedures of the Union institutions, agencies and bodies regardless of the value of the purchase are: Albania, Bosnia and Herzegovina, Iceland, Liechtenstein, Montenegro, Norway, Republic of North Macedonia and Serbia.

¹⁶ 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).

3.4. JOINT TENDERS

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

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

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

3.5. SUB-CONTRACTING

Subcontracting is the situation where a contract has been or is to be established between the contracting authority and a contractor/tenderer only and where the contractor or tenderer, in order to carry out that contract, enters into legal commitments with other entities for performing parts of the contract. The contracting authority has no direct legal commitment with the subcontractor(s). In practice, any third party involved in the contract implementation which has no legal link with the contracting authority but with the contractor will be considered as subcontractor (e.g. any other company which does not participate in the contract execution but provides financial capacity).

Subcontracting is permitted but the contractor will retain full liability towards the contracting authority for performance of the contract as a whole. The rules of access to EU public procurement (Section 3.1) do not apply to subcontractors.

Tenderers are required to identify subcontractors whose share of the contract is above 2% or whose capacity is necessary to fulfil the selection criteria.

3.6. COSTS

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

3.7. CONTENT OF THE TENDER

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

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

For the appraisal, the offer shall include a clear and detailed description of the organisation, resources and methodology proposed. The tenderers will provide a practical and detailed description of the resources and services proposed to achieve the objectives and results set out in Sections 1.3 and 1.4 above.

➤ Part E: Financial offer (Annex 7)

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

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

- The quoted price must be a fixed amount which includes all charges (including travel and subsistence). Travel and subsistence expenses are not refundable separately.
- A price must also be quoted to cover the tasks for the possible renewal (see above sections 1.8 and 1.6).

3.8. IDENTIFICATION OF THE TENDERER

The tender must include a cover letter (letter of submission of tender - Annex 2) presenting the name of the tenderer (including all entities in case of joint offer) and identified subcontractors if applicable, and the name of the single point of contact (leader) in relation to this procedure.

In case of joint tender, the cover letter must be signed either by an authorised representative for each member, or by the leader authorised by the other members with powers of attorney (Annex 4). The signed powers of attorney must be included in the tender as well. Subcontractors that are identified in the tender must provide a letter of intent (Annex 5) signed by an authorised representative stating their willingness to provide the services presented in the tender and in line with the present tender specifications.

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/EC¹⁷. This information is used for statistical purposes only.

In the course of this tender procedure the EU Validation Services may contact tenderers via the *Participant Register* and ask for supporting documents with respect to the legal existence and status. Please note that a request for supporting documents in no way implies that the tenderer has been successful.

Nevertheless, the Contracting Authority may ask, in the course of the procedure, for complementary supporting documents, other than those requested by the EU Validation Services. Such complementary documents may be asked so as to complete the checks on the compliance of successful entities with the selection criteria and/or to ensure that the entity is not in one of the exclusion situations referred to in this call for tenders.

¹⁷ OJ L 124/36, 20.5.2003

4. EVALUATION AND AWARD

4.1. EVALUATION STEPS

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

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

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

The Contracting Authority will assess these criteria in no particular order. The successful tenderer must pass all criteria to be awarded the contract.

4.2. VERIFICATION OF NON-EXCLUSION

All tenderers must provide a declaration on honour (Annex 3), signed and dated by an authorised representative, stating that they are not in one of the situations of exclusion listed in that declaration on honour.

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

In case of subcontracting, all subcontractors whose share of the contract is above 2% or whose capacity is necessary to fulfil the selection criteria must provide a declaration on honour signed by an authorised representative.

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

The successful tenderer must provide the documents mentioned as supporting evidence in the declaration on honour before signature of the contract and within a deadline given by the contracting authority. This requirement applies to each member of the group in case of joint tender and to all subcontractors whose share of the contract is above 2% or whose capacity is necessary to fulfil the selection criteria.

The obligation to submit supporting evidence does not apply to international organisations.

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

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

4.3. SELECTION CRITERIA

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

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

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

4.3.1. Declaration and evidence

The tenderers (and each member of the group in case of joint tender) and subcontractors whose capacity is necessary to fulfil the selection criteria must provide the declaration on honour (see Annex 3), signed and dated by an authorised representative, stating that they fulfil the selection criteria applicable to them. In case of joint tender or subcontracting, the criteria applicable to the tenderer as a whole will be verified by combining the various declarations for a consolidated assessment.

This declaration is part of the declaration used for exclusion criteria (see Section 4.2) so only one declaration covering both aspects should be provided by each concerned entity.

The Contracting Authority will **evaluate selection criteria on the basis of the declarations on honour (Annex 3) and the information included in the tables in Annex 2.1 and Annex 2.2, fully completed** and the evidence where requested.

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

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

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

4.3.2. Legal and regulatory capacity

Not applicable.

4.3.3. Economic and financial capacity criteria

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

Its average annual turnover for the last two years for which the accounts have been closed¹⁸ shall amount to at least EUR 3 750 000,00; this criterion applies to the tenderer as a whole, i.e. the combined capacity of all members of a group in case of a joint tender and subcontractors whose capacity is necessary to fulfil this criterion.

To this effect, the following should be provided with the tender in eSubmission from all tenderers and subcontractors whose capacity is necessary to fulfil the combined capacity:

- ✓ **Statement of Turnover in accordance with Annex 2.1** of these tender specifications completed with the information requested.

For tenderers (including all members of the group) except subcontractors:

In the course of this tender procedure the EU Validation Services may contact tenderers via the *Participant Register* and ask for supporting documents with respect to their economic and financial capacity. Please note that a request for supporting documents in no way implies that the tenderer has been successful.

Nevertheless, the Contracting Authority may ask, in the course of the procedure, for complementary supporting documents, other than those requested by the EU Validation Services. Such complementary documents may be asked so as to complete the checks on the compliance of successful entities with the selection criteria.

For subcontractors:

Subcontractors contributing to the combined financial and economic capacity of tenderers should submit with the tender the following documents in eSubmission:

- ✓ Copy of the Profit and Loss accounts for the last two years for which the accounts have been closed from each concerned legal entity;

Failing that,

- ✓ Appropriate statements from banks;

or

- ✓ Evidence of professional risk indemnity insurance.

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

¹⁸ In the case of joint tender or identified sub-contractors, the turnover must be provided for the same two years for all the partners/subcontractors.

4.3.4. Technical and professional capacity criteria and evidence

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

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

A. Criteria relating to tenderers:

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

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

Criteria	Evidence
✓ <i>Criterion A1: The tenderer must prove experience in the field of advanced technologies, urban development and advisory services and assistance, as well as in monitoring mechanisms.</i>	✓ Evidence A1: the tenderer must provide references for at least 3 completed projects delivered in these fields in the last three years with a minimum value for each project of € 300 000.
✓ <i>Criterion A2: The tenderer must prove expertise in advising and assisting local authorities and stakeholders on policy development and technology issues related to industrial transformation: e.g. establishment of networks of relevant stakeholders for the uptake of advanced technologies, development of investment strategies, smart use of available funds, development of public-private measures on key infrastructures or digital skills, etc.</i>	✓ Evidence A2: the tenderer must provide reference with a detailed description and links to at least 3 completed projects delivered in these fields in the last five years.
✓ <i>Criterion A3: The tenderer must prove expertise in organisation of workshops and high-level conferences.</i>	✓ Evidence A3: the tenderer must provide references – including a description of the activities performed -for at least 3 completed projects in the last five years that involved the organisation of workshops and high-level conferences with international reach and at least 200 participants.
✓ <i>Criterion A4: The tenderer must prove its capacity to provide its advisory services and assistance to cities and regions from all the EU Member States.</i>	✓ Evidence A4: the tenderer must provide references – including a description of the services offered -for at least 2 completed projects in the last five years offering advisory services to cities and/or regions from at least 15 different EU countries.

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

B. Criteria relating to the team delivering the service:

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

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

Criteria	Evidence
<p>✓ <i>B1 - Project Manager: At least 5 years' experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project having a budget of at least 2 million EUR and coverage of at least 10 countries, with experience in management of team of at least 10 people. Master level education or equivalent 7 years of experience.</i></p>	<p>✓ Evidence B1 - CV</p>
<p>✓ <i>B2 - Language quality controllers: at least 5 members of the team should demonstrate a native level English language proficiency or at least C2 level in the Common European Framework for Reference for Languages¹⁹</i></p>	<p>✓ Evidence B2 - A language certificate</p>
<p>✓ <i>B3 - At least 6 experts with minimum 2 years' experience in one or more of the following fields:</i></p> <p><i>(a) policy development on technology issues on a local level, as well as monitoring mechanisms related to industrial transformation and uptake of advanced technologies</i></p> <p><i>(b) shaping technology related public and private business strategies based on Advanced technologies</i></p> <p><i>(c) Consulting services to municipalities on business growth or private public partnership or in the context of the uptake of advanced technologies.</i></p>	<p>✓ Evidence B3 – CV</p>

4.4. AWARD CRITERIA

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

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

¹⁹ 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>

Criteria	Points
<p>✓ <i>Quality of the proposed methodology</i></p> <p><i>This criterion will assess the feasibility, robustness and effectiveness of the proposed methodology, how clear and sound it is, the capacity of the tenderer to present and justify the methodological choices and the relevance of the proposed solutions (including how the contractor is aiming to upgrade the existing methodology of the DCC, which working ways they propose and based on which existing work and research, how they plan to organise the timeframe of the initiative in order to make sure that in the end of it the participating cities will have started taking concrete actions and initiatives to turn their cities more intelligent, as defined in the introduction).</i></p>	40 points
<p>✓ <i>Organisation of the work and resources</i></p> <p><i>This criterion will assess how the roles and responsibilities of the proposed team and of the different economic operators (in case of joint tenders, and including subcontractors, if applicable) are distributed for each task. It will also assess 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.</i></p>	40 points
<p>✓ <i>Quality control measures</i></p> <p><i>This criterion will assess the quality control system proposed by the tenderer to ensure high level quality of the deliverables, the language quality check and the continuity of the service in case of absence of any member of the team. The quality system should be detailed in the technical offer and be specific to the tasks at hand; a generic quality system will result in a low score.</i></p>	20 points

4.5. RANKING OF TENDERS

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

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

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

4.6. INFORMATION TO TENDERERS ON THE FINAL EVALUATION

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

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

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

5. ANNEXES

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

Annex 1: Draft contract (for information)

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

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

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

Annex 4: Power of attorney

Annex 5: Letter of intent for sub-contractors

Annex 6: Not applicable

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

Annex 8: Checklist for Submission

Annex 9: EASME's Environmental Policy