



EUROPEAN CLIMATE, INFRASTRUCTURE AND
ENVIRONMENT EXECUTIVE AGENCY (CINEA)

CINEA.D - Natural resources, climate, sustainable blue economy and clean energy
D.3 - Sustainable Blue Economy

European Climate, Infrastructure and Environment Executive Agency (CINEA)

Call for tenders 2023/CINEA/OP/0014

**Towards an Intergovernmental Panel for Ocean
Sustainability (IPOS)**

(CINEA/EMFAF/3.6.1)

Open procedure

TENDER SPECIFICATIONS

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1. SCOPE AND DESCRIPTION OF THE PROCUREMENT

1.1. Contracting authority: who is the buyer?

This call for tenders is launched and managed by the European Climate, Infrastructure and Environment Executive Agency (CINEA) ⁽¹⁾, referred to as the contracting authority for the purposes of this call for tenders, acting under the powers delegated by the European Commission.

1.2. Subject: what is this call for tenders about?

The subject of this call for tenders is to contract services to support the contracting authority and the European Commission (in particular the Directorate General for Maritime Affairs and Fisheries) in their work towards an Intergovernmental Panel for Ocean Sustainability (IPOS).

1.3. Lots: is this call for tenders divided into lots?

This call for tenders is not divided into lots.

1.4. Description: what do we want to buy through this call for tenders?

The services that are the subject of this call for tenders, including any minimum requirements, are described in detail below under section 1.4.2.

Variants (alternatives to the model solution described in the Tender specifications) are not allowed. The *Contracting authority* will disregard any variants described in a tender.

1.4.1. Background and objectives

Objectives (General and Specific):

The main objective of the action is to provide the contracting authority and the European Commission (in particular the Directorate General for Maritime Affairs and Fisheries) with information (compilations of information, analysis, recommendations and advice) and support (events, communication, stakeholder engagement, administrative and political process support) for implementing the commitment related to the Intergovernmental Panel for Ocean Sustainability included in the Joint Communication of the Commission and the High

⁽¹⁾ CINEA was set up by Commission Implementing Decision (EU) 2021/173 of 12 February 2021 establishing the "European Climate, Infrastructure and Environment Executive Agency" (CINEA) and repealing Implementing Decisions 2013/801/EU, 2013/771/EU, 2013/778/EU, 2013/779/EU, 2013/776/EU and 2013/770/EU with effect from 1 April 2021 (OJ L 50, 15.2.2021, p. 9–28).

Representative for Foreign Affairs and Security Policy on international ocean governance published in June 2022 ⁽²⁾. The Joint Communication specifically states “*the EU will encourage creating a transdisciplinary intergovernmental science-policy interface for ocean sustainability, an Intergovernmental Panel for Ocean Sustainability (IPOS), building on applicable global expertise and existing scientific bodies*”. The overarching goal of the action is therefore to support production of transdisciplinary synthesis-based advice on ocean sustainability to policymakers and political processes at the global level, and to ensure dynamic communication between the scientific and policy communities and with stakeholders. The service shall ensure building a coalition of ocean science and policy actors along with stakeholders and in creating momentum towards launching an IPOS by the 3rd United Nations (UN) Ocean Conference to be held in June 2025 in Nice, France.

More specifically, the contractor shall provide support to the Commission’s actions, within the EU and internationally, towards the establishment of, and initial work of, a global science-policy platform, Intergovernmental Panel for Ocean Sustainability (IPOS), comprising relevant ocean science and policy actors along with civil society stakeholders. Although this Call refers to the IPOS as an Intergovernmental Panel, the feasibility study and political process may point to a relevance of starting the Panel, as a first step, as an International Panel. In this respect, the contractor shall support the work according to the steering by the contracting authority and the European Commission.

The contractor shall support the Commission in its work and pave the way towards a launch of the IPOS at the 3rd UN Ocean Conference in 2025.

To reach this goal, the contractor shall:

- activate a global network of scientists, other ocean-related experts and policy makers along with civil society stakeholders, in order to support the setting up of a dedicated science-policy interface for the ocean: Intergovernmental Panel for Ocean Sustainability (IPOS) that would provide a voice for the ocean on the international as well as the national scenes;
- build associated partnerships with civil society stakeholders, such as representatives of the private sector, NGOs, representatives of indigenous peoples and youth;
- support and promote regular, transdisciplinary, consensus-based synthesising of information from the existing scientific assessments of the state of the global ocean and pressures acting upon the ocean along with advice on sustainability pathways with the view to serve implementation of SDG 14;
- facilitate requests for knowledge and advice from policy makers on emerging priority issues;
- enable dynamic exchange and communication between the global ocean focused scientific community and policy makers as well as civil society stakeholders;
- support adaptive evidence-based decision-making which is underpinned by a dedicated two-way science-policy dialogue mechanism.

Background:

General

The 2030 Agenda for Sustainable Development ⁽³⁾ and its 17 Sustainable Development Goals (SDGs) is a universal call for action to end poverty, protect the planet and improve the lives

⁽²⁾ [EUR-Lex - 52022JC0023 - EN - EUR-Lex \(europa.eu\)](#)

⁽³⁾ [The Sustainable Development Agenda - United Nations Sustainable Development](#)

and prospects of everyone, everywhere. The SDG 14 sets the objective to “*conserve and sustainably use the oceans, seas and marine resources for sustainable development*” and its target SDG 14.a calls for an “*increase in scientific knowledge, develop research capacity and transfer marine technology*”.

To support the implementation of SDG 14, the United Nations organised the 2nd Ocean Conference in June 2022 with the overarching theme of “*Scaling up ocean action based on science and innovation*”. Implementation of the SDG 14 has not advanced at the speed or scale required to meet the goals. The 2nd UN Ocean Conference, through its declaration, stressed the need to strengthen the science-policy interface for implementing Goal 14 and its targets, to ensure that policy is informed by the best-available science and relevant indigenous, traditional and local knowledge, and to highlight policies and actions that may be scalable.

The UN has named the present decade (2021–2030) the UN Decade of Ocean Science for Sustainable Development. The vision of the decade is to “*achieve the science we need for the ocean we want*”.

Global ocean governance is based on the UN Convention on the Law of the Sea (UNCLOS) ⁽⁴⁾ which provides the legal framework within which all actions in the ocean must be carried out. Recent international agreements for better protecting biodiversity, namely the Kunming-Montreal Global Biodiversity Framework ⁽⁵⁾ agreed at the 15th meeting of the Conference of the Parties (COP) of the UN Convention on Biodiversity in December 2022 and the UN High Seas Treaty ⁽⁶⁾ agreed at the Intergovernmental Conference on Marine Biodiversity of Areas Beyond National Jurisdiction in March 2023, are redefining the way the ocean is governed. They provide goals and further defined rules for protection of biodiversity in general, and more specifically, for marine biodiversity in international waters.

One of the priorities of the European Commission is to strengthen the EU’s voice on the world stage by improving its standing as a champion of multilateralism and a rules-based global order. Under the European Green Deal ⁽⁷⁾, and its related EU Biodiversity Strategy ⁽⁸⁾, and other Union priorities, such as its renewed International Ocean Governance (IOG) agenda ⁽⁹⁾, the European Union is active in supporting the implementation of the 2030 Agenda for Sustainable Development, especially SDG 14 on life below water, and of the UNCLOS. The EU is also fully committed to the UN Decade of Ocean Science for Sustainable Development 2021-2030.

The 2022 EU IOG agenda recognises the importance of ocean science, observation, environmental monitoring, and prediction that underpin evidence-based action to protect and sustainably manage the ocean. Actions and solutions to the ocean health crisis and the development of a sustainable blue economy depend on the level of knowledge, understanding and capacity to innovate. The IOG agenda therefore calls for building-up ocean knowledge and lists a set of actions to do so.

⁽⁴⁾ [UNCLOS+ANNEXES+RES.+AGREEMENT](#)

⁽⁵⁾ [Kunming-Montreal Global Biodiversity Framework \(cbd.int\)](#)

⁽⁶⁾ [UN delegates reach historic agreement on protecting marine biodiversity in international waters | UN News](#)

⁽⁷⁾ [A European Green Deal \(europa.eu\)](#)

⁽⁸⁾ [Biodiversity strategy for 2030 \(europa.eu\)](#)

⁽⁹⁾ [Setting the course for a sustainable blue planet - Joint Communication on the EU’s International Ocean Governance agenda \(europa.eu\)](#)

The EU is set out to leverage its role as a global powerhouse in research and innovation to ensure that multilateral action is informed by the best possible scientific evidence. The EU provides approximately 350 million euro per year (2021-27) for ocean research and innovation and another 110 million euro per year (2021-23) to demonstrate practical solutions for improving ocean health through the Mission Restore Our Ocean and Waters by 2030 ⁽¹⁰⁾. The European Commission has also provided consistent support to evidence-informed policy making at a global level *inter alia* through contributing to the work of the Intergovernmental Panel on Climate Change (IPCC) on climate science and the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES) on biodiversity.

The global science-policy interfaces and the ocean

The global scientific panels (e.g., Intergovernmental Panel on Climate Change (IPCC), Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services (IPBES) and International Resource Panel (IRP)) provide important support for policies and decision-making related to climate, biodiversity and resource management policies. Although existing science-policy interfaces provide important information related to the ocean, it is spread out and no science-policy arrangement is entirely focused on the ocean, and having a holistic ocean perspective. This lack is significant as tackling the ocean health crisis and enhancing the development of sustainable blue economy all need effective underpinning from science and timely transfer of information between the scientific community, policy makers and the civil society at large.

An intergovernmental or international two-way science-policy interface with a strong stakeholder involvement could bring added-value, facilitating ocean health and sustainability, assessing knowledge, supporting policy-making and engaging and educating civil society. The interface would build on, complement and reinforce existing science-policy arrangements.

Scientific literature on ocean related science-policy developments is emerging. Gaill et al. (2022) ⁽¹¹⁾ envisions an International Panel for Ocean Sustainability (IPOS) that would function as a coordination mechanism grounded in integrated scientific knowledge representing a wide scope of actors. In their view, an IPOS should be able to “*reshape and coalesce knowledge to advance consensus on ocean status, promote collaboration and social learning between societal, political, and expert communities, guide policymakers in navigating future trade-offs, support sustainable ocean use, and inform the design of adaptive and anticipatory governance responses.*” In particular, Gaill et al. stress the need for future scenarios and pathways for guiding policy.

In the Gaill et al. (2022) vision, the scope of IPOS would be broader than that of an intergovernmental platform. They reflect on a staged approach for the evolution of the IPOS. In their view, a more flexible and autonomous approach at the outset would enable agility to address priority issues. They conclude that a combination of elements from both framings

⁽¹⁰⁾ [Restore our Ocean and Waters \(europa.eu\)](https://european-council.europa.eu/media/en/press-communications/infographic/infographic_restore_our_ocean_and_waters_by_2030_en.pdf)

⁽¹¹⁾ Françoise Gaill, Tanya Brodie Rudolph, Lara Lebleu, Denis Allemand, Robert Blasiak, William W. L. Cheung, Joachim Claudet, Leopoldo Cavaleri Gerhardinger, Nadine Le Bris, Lisa Levin, Hans- Otto Pörtner, Martin Visbeck, Anna Zivian, Pierre Bahurel, Laurent Bopp, Chris Bowler, Frédérique Chlous, Philippe Cury, Didier Gascuel, Sylvie Goyet, Nathalie Hilmi, Frédéric Ménard, Fiorenza Micheli, Lauren Mullineaux, Rémi Parmentier, Marie-Alexandrine Sicre, Sabrina Speich, Olivier Thébaud, Torsten Thiele, Martha Bowler, Philippe Charvis, Raphael Cuvelier, François Houllier, Sarah Palazot, Francis Staub and Olivier Poivre d’Arvor (2022): An evolution towards scientific consensus for a sustainable ocean future; *npj Ocean Sustainability* (2022) 1:7; <https://www.nature.com/articles/s44183-022-00007-1>

(international and intergovernmental) would potentially provide IPOS with needed agility (international), as well as authority and continuity (intergovernmental).

The EU is willing to act towards the definition and establishment of an IPOS. The IOG agenda encourages creating an Intergovernmental Panel for Ocean Sustainability (IPOS) building on applicable global expertise and existing scientific bodies and processes (e.g. IPCC, IPBES, World Ocean Assessment (WOA) ⁽¹²⁾). The European Parliament with its resolution entitled “Momentum for the Ocean: strengthening Ocean Governance and Biodiversity” (P9 TA(2022)0356) ⁽¹³⁾ and the EU Member States via Council conclusions on International Ocean Governance ⁽¹⁴⁾ support this initiative as well.

Landscape assessment reveals deep fragmentation in assessments

A preliminary examination of current organisations that produce ocean assessment information (e.g. IPCC, IPBES and UN DOALOS ⁽¹⁵⁾) and an analysis ⁽¹⁶⁾ of their assessment products (e.g. SROCC ⁽¹⁷⁾, Global Assessment Report on Biodiversity and Ecosystem Services ⁽¹⁸⁾ and WOA) reveals that the assessment landscape is highly fragmented when it comes to the ocean. There are many intergovernmental organisations that produce environmental assessment information, but of the 35 assessments examined only about a third included any information on the ocean. In most of those cases, the ocean was weakly covered. Most of the assessments have a slow publication cycle which does not serve faster paced policy cycles and it is much too slow to meet the pace and scale of change the ocean is facing. Hardly any of the assessments reviewed take a multi-disciplinary systems approach to the ocean. This does not correlate to the interconnected role the ocean plays in the stability of the biosphere.

Sustainability, management of human activities within the boundaries of a healthy ocean as presented e.g. by the SDG14, does not seem to be the guiding principle of any of the assessments nor is in the mandate of any of the assessment organisations. Out of the 35 examined, only nine assessments provided detailed information on SDG 14 and only 10 assessments informed on the interconnections between SDG 14 and other SDGs. Current ocean coverage in the assessments does not provide a compass for stewarding the ocean towards sustainability. This is in alignment with the fact that SDG 14 is the least funded SDG globally.

Input by the Contracting Authority:

The contracting authority and the European Commission will provide the necessary background information and access to data to the contractor at the project kick-off meeting and throughout the implementation of the project, as needed.

⁽¹²⁾ [Division for Ocean Affairs and the Law of the Sea | \(un.org\)](#)

⁽¹³⁾ [European Parliament resolution of 6 October 2022 on momentum for the ocean: strengthening ocean governance and biodiversity \(2022/2836\(RSP\)\) - Publications Office of the EU \(europa.eu\)](#)

⁽¹⁴⁾ [International ocean governance: an agenda for the future of our oceans - Consilium \(europa.eu\)](#)

⁽¹⁵⁾ [Division for Ocean Affairs and the Law of the Sea | \(un.org\)](#)

⁽¹⁶⁾ EMFAF funded, very low value contract, IPOS feasibility study (MARE/2022/VLVP/0025)

⁽¹⁷⁾ [Special Report on the Ocean and Cryosphere in a Changing Climate — \(ipcc.ch\)](#)

⁽¹⁸⁾ [Global Assessment Report on Biodiversity and Ecosystem Services | IPBES secretariat](#)

1.4.2. Detailed characteristics of the purchase

The present call aims at purchasing services focused on strengthening international ocean governance by enhancing science-policy interaction. More specifically, the contractor shall activate a global network of key ocean scientists, other experts and policy makers along with civil society stakeholders to support the setting up of a dynamic and functional science-policy interface for the ocean: Intergovernmental Panel for Ocean Sustainability (IPOS). The objective of IPOS shall be to provide a more powerful voice for the ocean on the international as well as the national scenes.

The geographical scope is global covering national as well as international waters.

The services shall be provided via the implementation of the following three work packages and the tasks and deliverables within them:

Work package 1: Social and economic aspects and best practices of existing arrangements

Task 1.1: Existing assessments on social and economic aspects

The aim of this task is to complement the previous IPOS landscape assessment study (MARE/2022/VLVP/0025) ⁽¹⁹⁾ and provide information on the social and economic aspects related to ocean and sustainability, and SDG 14, in the existing global assessments.

This task shall identify gaps and opportunities in the social and economic aspects of existing assessments with the SDG 14 as a reference. It will compile knowledge on the types of information the social and economic ocean analyses cover, whether the analyses are carried out in a harmonised manner, what geographies are covered, what is their quality and data availability and how stakeholders are engaged in the assessment processes.

The contractor shall build on the previous landscape assessment, cover at least the same organisations and assessments, and follow its methods and approaches. The contractor shall complement the previous landscape assessment's conclusions from the perspectives of social and economic aspects of ocean sustainability and provide a full feasibility assessment of IPOS by doing so.

The tenderer is requested to propose a plan (i.e. actions, timeline, actors, etc.) for carrying out this work as part of the tender.

Deliverable

D1: Report containing an analysis of social and economic aspects of SDG 14 in existing assessments, and a set of conclusions on feasibility of IPOS.

Time of delivery: By the end of May 2024 for possible use in a preparatory high-level event of the 2025 United Nations Ocean Conference (UNOC to be held in June 2024 in Costa Rica).

Task 1.2: Best practices in existing assessment organisations

The objective of this task is to inform on best practices, identified in existing assessment processes and organisations, to provide guidance for setting up an IPOS and carrying out its work.

⁽¹⁹⁾ The contracting authority will give access to relevant information after signature of the contract.

Under this task, the contractor shall compile information on best practices on how existing assessment processes for the ocean and SDG 14 are being carried out.

At a minimum, efficiency, effectiveness and coherence in producing and communicating assessment outputs will be assessed by the contractor. The processes to be analysed, when considering best practices shall contain *at least* the following: how the assessments are carried out from the identification of experts to agreeing on the focus and outline of the assessment to compiling the data and information, to drafting the assessment and producing graphs, summaries and information material to agreeing on the assessment products, on the ways of cooperation between scientists and policy makers as well as with the stakeholders. The task shall also analyse the ways of and identify best practices in incorporating non-scientific types of knowledge (indigenous, local communities' knowledge, etc.) into the assessment as well as communicating the results to policymakers and stakeholders.

The contractor shall analyse the best practices in structures and functions of existing assessment organisations, targeting the same organisations as in task 1.1.

At a minimum, efficiency, effectiveness and coherence of the structures and functions in relation to the intended assessment products will be addressed. The analysis of structures will include *at least* an analysis of the organisation as a whole, as well as of its parts, such as its composition of parties or participants, decision-making structures, subsidiary bodies, working groups and/or expert groups, the secretariat or corresponding and its relation to a possible framework it is embedded within or connected to (e.g. UN structure or agency), including its staffing. The analysis of functions will include *at least* an analysis of ways of arranging chairmanship and presidency at different levels of organisation, an analysis of meeting cycles and means (physical, hybrid, online, and if physical, geographical rotation), types of agendas and tasks of the meetings, analysis of participation in meetings and different strands of work, analysis of support and administrative functions by a secretariat or other permanent or semipermanent supporting structure.

The above information will be used to *provide guidance* specifically on:

- how non-scientific types of knowledge (indigenous, local communities' knowledge, etc.) can be associated to an integrated, regularly produced scientific consensus-based synthesis of ocean assessments;
- how to best organise the cooperation between the scientific and policy making communities into a science-policy interface with the view that policy makers will need to be able to express their needs for science output and receive the outcomes in a systematic and well communicated manner;
- how to best organise stakeholder engagement in the IPOS assessment process, allowing private enterprises, NGOs and other civil society actors to be included into knowledge production in a global but possibly decentralised and digital setting;
- best practices of internal processes of assessment organisations and the supporting secretariats in existing organisations that could serve setting up an IPOS.

The above analysis will build upon the information collected through the previous landscape assessment and further desktop study, using available sources, direct contacts with the secretariats or existing organisations and possible other methods the contractor may propose.

The tenderer is requested to propose a plan for carrying out this work as part of the tender.

Deliverable

D2: Report containing an analysis of existing organisations' best practices and provision of guidance stemming from them for use in setting up an IPOS.

Time of delivery: By the end of August 2024 feeding into the development of IPOS Terms of Reference (see task 2.1 and D3)

Work package 2: Supporting the setting up and start of IPOS functions

Task 2.1: IPOS Terms of Reference

The objective of this task is to develop:

- A) Terms of Reference (ToR) for the first IPOS synthesis report of ocean assessments and,
- B) ToR for the IPOS organisation, including its secretariat.

The development of the ToR for the first IPOS synthesis report shall build on findings of task 1.1 and deliverable D1 and the best practices identified in task 1.2 and reflected in deliverable D2. The development of the ToR for the IPOS organisation, including a secretariat, will also build on the best practices identified in task 1.2 and deliverable D2.

Both proposals for ToR shall be produced with the view that they will have the appropriate form and can serve the purpose of being submitted for consideration by a high-level meeting on IPOS planned for early 2025.

The tenderer is requested to propose a plan for carrying out this work as part of the tender.

Deliverable

D3:

- A) Proposal of the Terms of Reference of the first IPOS ocean sustainability synthesis report and,
- B) a proposal of the Terms of Reference of IPOS organisation, including a secretariat.

Time of delivery: By the end of November 2024 for submission to the contracting authority and Directorate-General for Fisheries and Maritime Affairs (DG MARE), as well as the project Steering Group for comments, feedback and approval, with a view to their finalisation after the high-level meeting for their submission to UNOC in June 2025.

Task 2.2: IPOS secretarial functions

The objective of this task is to plan and make available resources for secretarial functions of IPOS.

Under this task, the contractor shall develop a plan for arranging the work and functioning of the secretariat based on the Terms of Reference of IPOS organisation, including a secretariat, developed under task 2.1 (D3).

This task will include administrative, secretariat type of work that supports the IPOS coalition built through other actions (events, communication support to political processes) of this tender, in its work after the UN Ocean Conference in June 2025. In case the Conference will agree to set up an IPOS, this task shall enable starting administrative functions even before an eventual IPOS secretariat will take over. This work shall be carried out at the premises of and in association with or under a UN agency. This task shall include administration of staff and it shall include support to organising the work and meetings of IPOS, including documentation

before, during and after the meetings, and travel arrangements (travel costs of attendees other than those from the contractor not included under this task).

Deliverable

D4: Plan for the organisation of an IPOS secretariat.

Time of delivery: By mid May 2025 for submission to the contracting authority and DG MARE for comments and feedback, so that the plan will be ready for implementation after the UNOC in June 2025. The activity continues throughout the project period and implementation of the plan will be reported through regular meetings of the Steering Group of the project and in the interim and final reports.

Work package 3: Turning the IPOS into reality

Task 3.1: Marketing and communicating IPOS

The objective of this task is to create an identity and a brand for the IPOS and promote it. The goal is to engage to achieve willingness to participate and contribute by relevant science practitioners, policy makers, and stakeholders around the globe, i.e. to build an IPOS coalition. This shall be achieved through creating and implementing a brand and a marketing and communications strategy. A continuous review and update of the strategy during the IPOS development process is also expected.

The creation of a brand shall involve creating a visual and messaging identity of the IPOS in line with its purpose and vision as described e.g. in the Terms of Reference (task 2.1). The brand and the messaging identity, including relevant marketing products, will be made available in English.

Similarly, the marketing and communications strategy shall build upon the work carried out in the previous tasks. It shall be developed with the view to the importance of creating the IPOS into a global and functional partnership coalition. The task will be benefiting from the events and meetings to be organised under task 3.2. The strategy shall identify the target audiences and potential partners. Key messages shall also be outlined. All the above shall include highlighting to relevant international fora and stakeholders the EU's support the launching of the IPOS.

The marketing and communications strategy shall also lay out a plan of actions for its implementation. The contractor shall plan the actions with the use of a variety of communication channels, that may include traditional and social media, newsletters, websites, press releases, webinars, events and conferences. The strategy shall include a plan for its own monitoring and evaluating the effectiveness of its reach and impact, the degree to which it is influencing decisions or behaviour in the target audiences. The strategy shall also contain a plan for its own review after the UNOC in 2025.

Much of the expected resource under this task is to be used at the implementation phase. Implementation of the communication strategy will be regularly reported to the Steering Group of the project via the interim and final reports to the Contracting authority and DG MARE.

The tenderer is requested to propose a plan for carrying out this task as part of the tender.

Deliverables

D5: IPOS brand identity and a marketing and communications strategy with a plan of action

D6: Updated marketing and communications strategy with a plan of action

Time of delivery: By the end of November 2024 for submission of D5 to the Steering Group for comments and feedback with the view that it will be improved based on lessons learnt and the updated version D6 submitted to the Steering Group together with the plan for the organisation of an IPOS secretariat (D4) in May 2025. The activity, especially implementation of the brand identity and communication action, continues almost throughout the project period, including a review of the strategy after the UNOC in 2025.

Task 3.2: Events for promoting IPOS

The objective of this task is to support building the IPOS coalition and marketing IPOS globally through at least four events to be organised involving the science and policy-making communities as well as stakeholders.

The contractor shall organise at least four international seminar-like events in different and relevant parts of the world. These events will be used to simultaneously support tasks in work packages 1 and 2 and further support the work under task 3.1.

Events shall preferably be held in different continents, and, if possible, together with (an) organisation(s) already in the IPOS coalition. The events shall be targeted to the science and policy makers' communities and stakeholders, involving, as far as necessary, the high political level and financing institutions, and other relevant stakeholders. These events shall be devoted to explaining the ideas and work behind IPOS (e.g. deliverables under work packages 1 and 2), and to obtaining views on making the IPOS functional and of assessing possible roles and contributions of the participants. Relevant organisations' secretariats involved in existing ocean assessment processes, such as relevant UN bodies (to be identified by the contractor) will be invited to participate and to consider how they would be willing and able to participate or be involved in the IPOS.

The contractor will propose a planning and timeline, including a budget, for the organisation and implementation of the set of events. The contractor will collaborate with partners in the emerging IPOS coalition (e.g. states, institutions, civil society organisations, etc.) and the partners will be offered to invite and co-host these events (on their own cost).

The tenderer is requested to propose a plan for carrying out this task as part of the tender, including timing, countries, participants.

Deliverable

At least 4 events: reporting on the organisation and outcomes of the events are to be included in the appropriate reports (i.e. interim report, progress meetings reports, final report).

Task 3.3: Support to the political process for IPOS

The objective of this task is to provide support to the political process towards the setting up of the IPOS and building the coalition including State partners. The political process will involve various types of high-level meetings, bilateral meetings, and other occasions for interaction of the high-level representatives and experts of States and the European Commission. The political process will emerge and be clarified as the work on setting up the IPOS evolves.

The contractor shall support the European Commission/DG MARE and the emerging IPOS coalition's partners in their endeavour to achieve a political agreement on launching the IPOS at the 3rd UN Ocean Conference in June 2025. The support activities will include preparedness to present IPOS related materials from the project in relevant events related to

the UN Ocean Conference, and to participate in the IPOS related work during the Conference, such as organising possible side events.

More specifically, the contractor shall support the European Commission/DG MARE in organising a high-level meeting in early 2025 ahead of the 3rd UN Ocean Conference 2025. The support activities will include preparedness to present IPOS related material developed by the project and to participate in the preparation and organisation of the high-level meeting. The material is foreseen to include *inter alia* results of the work from work package 1 and elements of the Terms of References prepared in work package 2. The aim would be for the high-level meeting to consider and find consensus on the elements of the Terms of References. The high-level meeting will also be useful for building interested States' coalition around IPOS and attract interest of potential financiers. Furthermore, the high-level meeting should also validate a list of policy priorities or questions for consideration by scientists in an event or a science conference that is likely to be organised prior to the UN Ocean Conference, and ultimately by the UN Ocean Conference itself.

The exact workplan for this task will be defined by the European Commission/DG MARE successively in collaboration with the Steering Group through regular meetings, as the preparations of both the high-level meeting and the UN Conference proceed.

Deliverable

Reporting on implementation of this activity in the inception, interim and final reports as well as in the power point presentations to the meetings.

Time of delivery: Meetings of the Steering Group.

General guidance on methodology:

The social and economic aspects (task 1.1) and best practices (task 1.2) shall be addressed through a desktop study comprising a literature review, online research and, as necessary, online survey(s) and interviews. Task 1.1 may organise a survey targeting the ocean assessment expert bodies, their secretariats, scientific and policy-making communities as well as stakeholders, such as private enterprises, NGOs, and other civil society groups.

For task 2.1, the contractor shall organise the necessary work for the development of both ToRs, possibly involving the setting up of a task force group of interested IPOS collaborators outside of the project.

For task 3.1, the contractor shall utilise relevant marketing and communications methods which are suited to deliver the expected outcomes. Similarly, task 3.2 shall be implemented using modern, efficient and fit for purpose conferencing methods with an emphasis on the objective of engaging events' participants into IPOS coalition.

The tenderer must provide a full and detailed plan for how it intends to carry out the tasks and produce the deliverables. The plan must include a description of the intended methods and resources to be used. In particular, the tenderer must provide detailed plans for how it intends to carry out tasks 1.1., 1.2, 2.1, 3.1 and 3.2 as further specified above.

It is the contractor's responsibility to make sure the necessary permission/agreements for taking pictures and filming have been obtained by the participants prior to the events.

Image rights disclosure forms have to be provided to and collected from the participants by the contractor via the registration/application process, in line with Regulation (EU) 2016/679

of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons.

Green Public Procurement and events

☞ In line with the Directive 2014/24/UE of the European Parliament and of the Council on public procurement, tenderers are expected to describe any action they envisage for environment and energy efficient solutions, incorporating these concerns into all aspects of service delivery and infrastructure management.

The services provided by the Contractor must contribute to the Commission's commitment to minimise the environmental impact of its everyday work and continuously improve its environmental performance by integrating environmental criteria into its procurement procedures and organisation of events.

Services need to fulfil a number of standards as to the ethical, social and environmentally friendly origin, production, delivery and distribution of the materials. The principles and strategies linked to the sustainable use of natural resources, waste prevention and recycling will be taken into account. Examples of proofs/labels: compliance with EMAS, ISO 14 001, EU Ecolabel, and other ISO type I label, equivalent labels and standards, etc. Further information and guidelines can be found in the [EMAS](#) dedicated web page.

Sustainable meetings and events

☞ Tenderers can refer to the “[Guidelines on organising sustainable meetings and events at the Commission](#)”

The contractor is encouraged to reduce the environmental impact of events or meetings 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 is encouraged to consider measures for the performance of the tasks under the contract, which increase the social impact of the contract. For instance, this could involve recurring to operators working on the professional integration of disadvantaged persons, women, and long-term unemployed people or considering accessibility for all solutions, facilitating the participation of people with disabilities.

Transition and Handover details at the end of the contract

The contractor must provide an adequate overview of the state of play at the end of the contract and must guarantee its cooperation for transition meetings and handing over the products and services developed under this contract, as well as their management, in a progressive, secured and orderly manner to the contracting authority or any party designated by the contracting authority.

To this end, the contractor will undertake the necessary actions to safeguard the continuity of the products and services developed. Together with its final report, the contractor will provide the full list of pre-existing rights, if any, within the result of the contract and provide evidence on their acquisition, to ensure the full use of the results and any pre-existing material (if applicable), by the *Contracting authority*.

In their offer, tenderers shall include a Legacy Strategy explaining how they will enable a smooth transition to the *Contracting authority* or to any party to be designated by the *Contracting authority*. This strategy must ensure that IT tools and databases are compatible with the European Commission's information technology architecture and guidelines and also refer to the transfer of Intellectual Property Rights (see Articles I.10 and II.13 of the draft service contract).

1.4.3. Intellectual Property Rights

The intellectual property rights related to the services/studies are foreseen in Articles I.10 and II.13 of the draft service contract.

Parts of results pre-existing the contract

If the results are not fully created for the purpose of the contract this should be clearly pointed out in the tender. Information should be provided about the scope of pre-existing materials, their source and when and how the rights to these materials have been or will be acquired.

Plagiarism in the tender

In the tender all quotations or information originating from other sources and to which third parties may claim rights have to be clearly marked (such as: source publication including date and place, creator, number, full title etc.) in a way allowing easy identification.

1.4.4. Confidentiality and Data Protection

Confidentiality is required of all persons working or collaborating directly or indirectly in the performance of tasks following this call for tender, as they might come into contact with confidential information during the course of their work (see Article II.8 of the draft service contract). Any breach of confidentiality will be treated as professional misconduct and could lead to the termination of the contract as set out in Article II.18 of the draft service contract.

Specific requirements relating to personal data and the protection thereof are set out in the draft service contract. The contractor is equally responsible for ensuring the application of this obligation in respect of any of his/her direct or indirect sub-contractors.

The contractor will ensure compliance with the applicable data protection rules at national and EU levels, including:

- the Regulation (EU) 2018/1725 of the European Parliament and of the Council of 23 October 2018 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 ⁽²⁰⁾ and

⁽²⁰⁾ <https://eur-lex.europa.eu/legal-content/EN/TXT/?qid=1543484984668&uri=CELEX:32018R1725>

- Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 on the protection of natural persons with regard to the processing of personal data and on the free movement of such data, and repealing Directive 95/46/EC (General Data Protection Regulation) ⁽²¹⁾.

During the contract implementation, the contractor must comply with the *Contracting authority*'s personal data protection procedures, including models of data protection notice (e.g. for the website, event, survey, etc.) provided by the *Contracting authority*, and with the general and specific contractual clauses I.7 and II.9, when processing personal data of stakeholders on behalf of *Contracting authority*.

The contractor will cooperate with the *Contracting authority* in ensuring that personal data is handled lawfully and if required not without explicit prior consent of the subjects involved (e.g. beneficiaries and their subcontractors).

In addition, the contractor will ensure that personal data is processed and accessible only within the territory of the European Union and the European Economic Area and will not leave that territory. Access to data may be given on a need to know basis only to authorised persons established in a country which has been recognised by the European Commission as providing adequate protection to personal data.

All websites, platforms, digital applications and online registration forms containing personal data must be hosted within the European Union and abide by the same legal obligations on personal data protection as provided in Article I.7 of the draft service contract.

1.4.5. Performance and quality requirements

All deliverables under this contract will be assessed on the basis of the following quality criteria, and rated (poor/satisfactory/good/very good/excellent) in relation to the following aspects:

- **Relevance:** the deliverables respond to the information and other needs expressed in the tender specifications as well as to the objectives, targets and activities, and are submitted according to the timetable.
- **Appropriate methodology:** the design of the methodology is adequate for obtaining the results needed and functional to deliver the impact required under the tender specifications.
- **Reliable data:** data collected are adequate for their intended use and their reliability has been ascertained and established by the contractor.
- **Sound analysis:** data and other information has been systematically and critically analysed to answer relevant questions and needs.
- **Clarity:** reports, other documents and presentations are well structured, balanced and written and laid out in an understandable manner.
- **Valid conclusions:** findings in Task 1.1 follow logically from and are justified by the data/information analysis and interpretations based on pre-established criteria and are rational.

⁽²¹⁾ <https://eur-lex.europa.eu/eli/reg/2016/679/oj>

- **Helpful recommendations:** all dimensions of requested guidance outlined for Task 1.2 have been covered and appropriately justified.

In addition to the general and specific objectives defined in *Section 1.4.1*, the following list shows the expected results in concise and approximate terms, so as to give a general idea of what is requested from the contractor.

Work Package	Tasks and deliverables	Performance indicators
WP1	<p>Task 1.1 Existing assessments on social and economic aspects</p> <p>Deliverable 1: Report containing an analysis of social and economic aspects of SDG 14 in existing assessments, and a set of conclusions on feasibility of IPOS</p>	<p>Completeness in terms of organisations, processes and assessments addressed as well as completeness in terms of feasibility study's final content.</p> <p>Reliable collection of data and robustness and sound analysis of the data.</p> <p>Concision of conclusions.</p>
	<p>Task 1.2 Best practices in existing assessment organisations</p> <p>Deliverable 2: Report containing an analysis of existing organisations best practices and guidance for IPOS</p>	<p>Completeness in terms of organisations, processes and assessments addressed.</p> <p>Reliable collection and sound analysis of data.</p> <p>Relevance, completeness and feasibility of the guidance provided.</p>
WP2	<p>Task 2.1 IPOS Terms of Reference</p> <p>Deliverable 3:</p> <p>A) Proposal of the Terms of Reference of the first IPOS ocean sustainability synthesis report and,</p> <p>B) a proposal of the Terms of Reference of IPOS organisation, including a secretariat.</p>	<p>Relevance (fit for purpose, justifiable based on the available data and analysis), clarity (concision, language) and feasibility of the draft Terms of References.</p>
	<p>Task 2.2 IPOS Secretarial functions</p> <p>Deliverable 4: Plan for the organisation of an IPOS secretariat</p>	<p>Relevance (fit for purpose, justifiable based on the available information) of the plan.</p> <p>Success in providing administrative support and delivering functions akin to an international secretariat.</p>

WP3	<p>Task 3.1 Marketing and communicating IPOS</p> <p>Deliverable 5: IPOS brand identity and a marketing and communications strategy with a plan of action</p> <p>Deliverable 6: Updated marketing and communications strategy with a plan of action</p>	<p>Relevance (fit for purpose, justifiable based on the available data and analysis) and effectiveness (delivery of IPOS visibility, interest and willingness to participate in the IPOS activities and of IPOS coalition formation) of the brand identity and of the marketing and communications strategy with a plan of actions.</p>
	<p>Task 3.2 Events for promoting IPOS</p> <p>Deliverable: Reporting on the organisation and outcomes of the events to be included in the appropriate reports (i.e. interim report, progress meetings' reports, final report).</p>	<p>Strategic planning, successful implementation with smooth operations and effectiveness (delivery of interest and willingness to participate in the IPOS activities and of IPOS coalition building) of the events promoting IPOS, while keeping to the budget.</p>
	<p>Task 3.3 Support to the political process for IPOS</p>	<p>Flexibility and high quality in the support service.</p>

1.4.6. Deliverables

The contractor must provide the required deliverables and reports in accordance with the conditions of the draft service contract.

When requested in the contract the reports and linked deliverables will accompany the request(s) for payments.

Each report or document will be submitted in electronic format compatible with Microsoft Office (Word, Excel) and PDF or equivalent 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.

Materials and 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.).

It will remain contractor's responsibility to ensure a properly application of quotation and the verification of improper re-use of existing material.

All studies produced for the European Commission and Executive Agencies shall conform to 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 ⁽²²⁾.

⁽²²⁾ The Visual Identity Manual of the European Commission is available upon request. Requests should be made to the following e-mail address: comm-visual-identity@ec.europa.eu

Inception report

The inception report will cover all the tasks under the contract. It will provide a comprehensive overview of the planned methodology, organisation of work and timelines for the implementation of all tasks and for the submission of all deliverables to the contracting authority.

The inception report shall not be longer than 30 pages. The power point presentation from the kick off meeting shall be annexed to the inception report.

Interim report

The interim report shall include information on activities and achievements under all tasks so far. The interim report shall be accompanied by a request for interim payment, through the submission of an invoice of 30% of the contract value.

The Contracting authority will approve any submitted documents or deliverables and pay in compliance with the rules laid down in the special conditions of the service contract (Draft service contract - section I.5. Payment arrangements).

Final report

The draft final report will be submitted half a month prior to the final meeting, and it will be presented at the final meeting to the Contracting authority and the European Commission with the view to being finalised based on comments received in association with the final meeting.

The final report shall be developed to give a detailed overview of the actions and deliverables of the project. It shall build cumulatively on the progress of the work and the interim report and contain a full account of the project actions and the finalised deliverables shall be annexed to the report. It will contain new information in relation to the progress to date, especially on activities under task 2.2 IPOS Secretarial functions, on task 3.1 Marketing and communicating IPOS and task 3.3. Support to the political process for IPOS, and any other actions that might have taken place since the previous progress report.

The final report should also include a section on uncertainties and how they might be resolved in the future.

The final report shall be accompanied by a request for payment of the balance, through the submission of an invoice of 70% of the contract value.

The Contracting authority will approve any submitted documents or deliverables and pay in compliance with the rules laid down in the special conditions of the service contract (Draft service contract - section I.5. Payment arrangements).

Intermediate outputs and deliverables

Power point presentations to all the meetings

The power point presentations to the meetings shall present an overview of accomplished actions, achievements, and deliverables of the preceding phases of implementation, as defined in these tender specifications. Particular attention will be paid to reporting on activities and achievements under tasks 3.2 and 3.3 with no specific deliverables.

Deliverable 1 - Report containing an analysis of social and economic aspects of SDG 14 in existing assessments, and a set of conclusions on feasibility of IPOS

Deliverable 2 - Report containing an analysis of existing organisations best practices and guidance for IPOS

Deliverable 3 - A) Proposal of the Terms of Reference of the first IPOS ocean sustainability synthesis report, and B) a proposal of the Terms of Reference of IPOS organisation, including a secretariat

Deliverable 4 - Plan for the organisation of an IPOS secretariat

Deliverable 5 - IPOS brand identity and a marketing and communication strategy with a plan of action

Deliverable 6 - Updated marketing and communications strategy with a plan of action

Final outputs and deliverables

At the end of the contract the contractor shall provide the final report as well as all final versions of intermediate deliverables (as annexes).

1.4.7. Meetings

During the implementation of the contract, the contractor will have regular exchange of emails with the contacting authority and the European Commission. Between the official meetings, online informal meetings to follow up the progress of the project can be called-upon by the project manager and the Contracting authority and the European Commission.

Five official meetings will be held during the course of the contract: a kick-off, an interim meeting, two progress meetings and a final meeting. The kick-off meeting will be held in person in Brussels at the contracting authority's premises. In such case, the necessary costs will be borne by the contractor. It will be jointly agreed whether the other meetings will take place in Brussels, possible other venues, or remotely through videoconference.

The interim and progress meetings will assess how the tasks and actions are progressing and discuss draft deliverables as indicated in the timetable of the section 1.4.8. The interim, progress and final meetings shall take place two weeks after the submission to the Contracting authority of the requested deliverables, reports and/or presentations indicated for each meeting.

For each meeting, the contractor shall provide the minutes of the meeting within a week after the meeting.

The timetable for the submission of the draft/final reports and power point presentations as well as the timing of the meeting has been presented in 1.4.8 (Indicative timetable).

Kick off meeting

The kick-off meeting shall take place within two weeks from the signature of the contract. Four days prior to the kick-off meeting, the contractor shall submit to the meeting a draft inception report and a corresponding power point presentation. The kick off meeting shall consider the inception report and work plans presented therein. The Commission will inform

the contractor of relevant political events and processes and expected support from the contractor under task 3.3.

Progress meetings

Two progress meetings have been scheduled to allow consideration of project deliverables and overall progress with the tasks and actions. The timetable for the submission of draft deliverables and power point presentations as well as the timing of the meeting has been presented in 1.4.8 (Indicative timetable).

Interim meeting

An interim meeting has been scheduled to allow consideration of project deliverables and overall progress with the tasks and actions. The timetable for the submission of draft deliverables and power point presentations as well as the timing of the meeting has been presented in 1.4.8 (Indicative timetable).

Final meeting

The final meeting shall take place two weeks after the submission of the draft final report. The final meeting will be the occasion for the contractor to present the actions and achievements of the whole project to the Contracting Authority and the European Commission.

1.4.8. Indicative timetable

The tenderer shall propose in its offer a detailed work plan, which clearly indicates the sequences and timing of the work. It must take into consideration the following indicative timetable elements: the start of the contract has been planned for February 2024 in such a manner that the actions and deliverables from the project will be available in a timely manner prior the high-level meeting on IPOS in early 2025, by the end of November 2024 at the latest, and by mid-May 2025, prior to the 3rd UN Ocean Conference in June 2025. If there will be changes to the start of the contract, the timetable must be adjusted accordingly to ensure availability of deliverables to the political processes as indicated in the original timetable below.

Timetable (months/weeks/days)	Meetings	Actions/Deliverables
Reference date (T0)		Start date of the contract
T0 + 10 days		Draft Inception report and a power point presentation for the kick-off meeting
T0 + 14 days	Kick-off meeting	Kick-off meeting minutes – one week after the meeting
T0 + 1 month		Final Inception report
T0 + 3,5 months		Draft deliverable D1 and a power point presentation for the 1 st Progress meeting
T0 + 4 months	1 st Progress meeting	Progress meeting minutes one week after the meeting
T0 + 4,5 months		Final deliverable D1

T0 + 6,5 months		Draft deliverable D2 and a power point presentation for comments by email
T0 + 7,5 months		Final deliverable D2
T0 + 9,5 months		Draft Interim report and draft deliverables D3 and D5, and a power point summarising them for the Interim meeting. Invoice for interim payment (30% of the total value of the contract).
T0 + 10 months	Interim meeting	Interim meeting minutes one week after the meeting
T0 + 10,5 months		Final Interim Report and final deliverables D3 and D5
T0 + 14,5 months		Draft deliverables D4 and D6, and a power point presentation for the 2 nd Progress meeting
T0 + 15 months	2 nd Progress meeting	Progress meeting minutes one week after the meeting.
T0 + 15,5 months		Final deliverables D4 and D6
T0 + 23 months		Draft final report and a power point presentation for the Final meeting. Invoice for the payment of the balance (70%).
T0 + 23,5 months	Final meeting	Final meeting minutes one week after the meeting
T0 + 24 months		Final Report and all deliverables

1.4.9. Content, structure and graphic requirements of publishable deliverables

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

Final report

The final report must include:

- 1) an abstract of no more than 200 words, in English, including:
 - key words to facilitate electronic information retrieval;
 - specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
 - the following disclaimer:

“This document has been prepared for the European Climate, Infrastructure and Environment Executive Agency (CINEA), however, it reflects the view of the authors and the European Commission or the European Climate, Infrastructure and Environment Executive Agency (CINEA) are not liable for any consequence stemming from the reuse of this publication.”

2) a publishable executive summary of maximum 10 pages, in English, including:

- Non-technical language for the general public including main findings, conclusions and, if applicable, recommendations;
- The rationale and description of methods, presentation and discussion of results, including full and traceable documentation of sources, and data gathered for the Deliverables;
- specific identifiers which must be incorporated on the cover page provided by the Contracting Authority;
- the following disclaimer:

“This document has been prepared for the European Climate, Infrastructure and Environment Executive Agency (CINEA), however, it reflects the view of the authors and the European Commission or the European Climate, Infrastructure and Environment Executive Agency (CINEA) are not liable for any consequence stemming from the reuse of this publication.”

Requirements for publication on Internet

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

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

For full details on the Commission policy on accessibility for information providers, see: https://european-union.europa.eu/accessibility-statement_en

Graphic requirements

The contractor must deliver the report 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

Standard WORD template

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

1.5. Place of performance: where will the contract be performed?

The services will be performed at the following locations:

- the contractor's premises
- third countries outside the EU and for events, as necessary
- at the premises of the contracting authority or the European Commission or other venues in Brussels for any in-person meetings.

1.6. Nature of the contract: how will the contract be implemented?

The procedure will result in the conclusion of a direct contract.

In direct contracts all the terms governing the provision of the services, supplies or works are defined at the outset. Once signed, they can be implemented directly without any further contract procedures.

Tenderers need to take full account of the full set of procurement documents, including the provisions of the draft contract as the latter will define and govern the contractual relationship(s) to be established between the contracting authority and the successful tenderer. Special attention is to be paid to the provisions specifying the rights and obligations of the contractor, in particular those on payments, performance of the contract, confidentiality, and checks and audits.

⚠ Please be aware that if a tenderer to whom the contract is awarded (any of the group members in case of a joint tender) has established debt(s) owed to the Union, the European Atomic Energy Community or an executive agency when the latter implements the Union budget, such debt(s) may be offset, in line with Articles 101(1) and 102 of [Regulation \(EU, Euratom\) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union \(Financial Regulation\) ^{\(23\)}](#) and the conditions set out in the draft contract, against any payment due under the contract. The contracting authority will verify the existence of overdue debts of the successful tenderer(s) (any of the group members in case of a joint tender), and, if any such debt is found, will inform the tenderer (the group leader in case of a joint tender who will then have the obligation to inform all other group members before signing the contract) that the debt(s) may be offset against any payment under due the contract.

⁽²³⁾ Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union, amending Regulations (EU) No 1296/2013, (EU) No 1301/2013, (EU) No 1303/2013, (EU) No 1304/2013, (EU) No 1309/2013, (EU) No 1316/2013, (EU) No 223/2014, (EU) No 283/2014, and Decision No 541/2014/EU and repealing Regulation (EU, Euratom) No 966/2012 (OJ L 193 of 30.07.2018, p.1).

1.7. Volume and value of the contract: how much do we plan to buy?

The maximum total amount of all purchases under this call for tenders is indicated under Section II.1.5 of the contract notice and is EUR 985 000 EUR including all charges and expenses and excluding any renewals. No contract offer above this amount will be considered.

1.8. Duration of the contract: how long do we plan to use the contract?

The contract resulting from this call for tenders will be concluded for at most 24 months. The details of the contract duration are set out in the draft contract.

1.9. Electronic exchange system: can exchanges under the contract be automated?

For all exchanges with the contractor during the implementation of the contract resulting from this call for tenders as well as for future possible subsequent proceedings, including, but not limited to, for the purposes of EDES ([European Union's Early Detection and Exclusion System](#)), the contracting authority may use an electronic exchange system meeting the requirements of Article 148 of the Financial Regulation. At the request of the contracting authority, the use of such a system shall become mandatory for the contractor at no additional cost for the contracting authority. Details on specifications, access, terms and conditions of use will be provided in advance.

2. GENERAL INFORMATION ON TENDERING

2.1. Legal basis: what are the rules?

This call for tenders is governed by the provisions of the Financial Regulation.

The contracting authority has chosen to award the contract resulting from this call for tenders through an open procedure pursuant to Article 164(1) (a) of the Financial Regulation. In an open procedure any interested economic operator (any natural or legal person who offers to supply products, provide services or execute works) may submit a tender.

The call for tenders is based on Commission implementing decision of 26.1.2022 on the financing of the European Maritime, Fisheries and Aquaculture Fund and the adoption of the work programme for 2022 and 2023.

2.2. Entities subject to restrictive measures and rules on access to procurement: who may submit a tender?

Tenderers must ensure that no involved entities (see Section 2.4) nor any subcontractors, including those which do not need to be identified in the tender (see Section 2.4.2), are subject to [EU restrictive measures](#) adopted under Article 29 of the Treaty on the European Union (TEU) or Article 215 of the Treaty on the Functioning of the EU (TFEU) ⁽²⁴⁾, consisting of a prohibition to make available or transfer funds or economic resources or to provide financing or financial assistance to them directly or indirectly, or of an asset freeze. The prohibition applies throughout the whole performance of the contract.

⚠ Following the Council Implementing Decision (EU) 2022/2506, as of 16th December 2022, no legal commitments can be signed with Hungarian public interest trusts established under Hungarian Act IX of 2021 or any entity they maintain. This applies to all contractual level commitments, including subcontractors.

Participation in this call for tenders 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 provided that it has a special agreement with the European Union in the field of public procurement on the conditions laid down in that agreement ⁽²⁵⁾.

The Agreement on Government Procurement ⁽²⁶⁾ concluded within the World Trade Organisation does not apply. Therefore, the participation to this call for tenders is not open to natural and legal persons established in the countries that have ratified this Agreement.

⁽²⁴⁾ Please note that the EU Official Journal contains the official list and, in case of conflict, its content prevails over that of the [EU Sanctions Map](#).

⁽²⁵⁾ 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: (under the Stabilisation and Association Agreements (SAA)) North Macedonia, Albania, Montenegro, Serbia, Bosnia and Herzegovina and Kosovo; (under the EEA Agreement) Iceland, Norway and Liechtenstein; (under the Association Agreement (AA)) Georgia, Moldova and Ukraine.

The rules on access to procurement do not apply to entities on whose capacity tenderers rely to fulfil the selection criteria nor to subcontractors. Subcontracting may not be used with the intent or effect to circumvent the rules on access to procurement.

To enable the contracting authority to verify the access, each tenderer must indicate its country of establishment (in case of a joint tender – the country of establishment of each group member) and must present the supporting evidence normally acceptable under the law of that country. The same document(s) could be used to prove the country/-ies of establishment and the delegation(s) of the authorisation to sign, as described in Section 4.3.

2.3. Registration in the Participant Register: why register?

Any economic operator willing to participate in this call for tenders must be registered in the [Participant Register](#) - an online register of organisations and natural persons (participants) participating in calls for tenders or proposals of the European Commission and other EU institutions/bodies.

On registering each participant obtains a Participant Identification Code (PIC, 9-digit number), which acts as its unique identifier in the Participant Register. A participant needs to register only once – the information provided can be further updated or re-used by the participant in other calls for tenders or calls for proposals of the European Commission and other EU institutions/bodies.

⚡ Each participant needs to ensure that its SME status in the Participant Register is registered and kept up to date.

At any moment during the procurement procedure, the Research Executive Agency Validation Services (hereafter *the EU Validation Services*) may contact the participant and ask for supporting documents on legal existence and status [and financial capacity]. The requests will be made through the register's messaging system to the e-mail address of the participant's contact person indicated in the register. It is the responsibility of the participant to provide a valid e-mail address and to check it regularly. The documents that may be requested by *the EU Validation Services* are listed in the [EU Grants and Tenders Rules on Legal Entity Validation, LEAR appointment and Financial Capacity assessment](#).

⚡ Please note that a request for supporting documents by the *EU Validation Services* in no way implies that the tenderer has been successful.

2.4. Ways to submit a tender: how can economic operators organise themselves to submit a tender?

Economic operators can submit a tender either as a sole economic operator (sole tenderer) or as a group of economic operators (joint tender) ⁽²⁷⁾. In either case subcontracting is permitted.

⁽²⁶⁾ https://www.wto.org/english/tratop_E/gproc_e/gp_gpa_e.htm.

⁽²⁷⁾ Each economic operator participating in the joint tender is referred to as “group member”.

Tenders must be drawn and submitted in complete independence and autonomously from the other tenders. A declaration in this regard by each tenderer (in case of a joint tender, by each of its members) shall be requested.

A natural or legal person cannot participate at the same time and within the same procedure either as member of two or more groups of economic operators or as a sole tenderer and member of another group of economic operators. In such case, all tenders in which that person has participated, either as sole tenderer or as member of a group of economic operators, will be rejected.

Economic operators linked by a relationship of control or of association (e.g. belonging to the same economic/corporate group) are allowed to submit different and separate tenders provided that each tenderer is able to demonstrate that its tender was drawn independently and autonomously.

A natural or legal person may act as subcontractor for several tenderers as long as the tenders are drawn and submitted in complete independence and autonomously from each other. However, cross subcontracting among tenderers is forbidden, more precisely an entity “A” may participate as tenderer (either as sole tenderer or as member of a group of economic operators) and as subcontractor to another tenderer “B” within the same procurement procedure. However, in this case it is forbidden that tenderer “B” (or any of its participating members in case of a group of economic operators) is at the same time subcontractor for tenderer “A” (or for the group of economic operators in which “A” participates) within the same procurement procedure. In this case, both tenders A and B shall be rejected.

In order to fulfil the selection criteria set out in Section 3.2 the tenderer can rely on the capacities of subcontractors (see Section 2.4.2) or other entities that are not subcontractors (see Section 2.4.3).

An “**involved entity**” is any economic operator involved in the tender. This includes the following four categories of economic operators:

- sole tenderer,
- group members (including group leader),
- identified subcontractors (see Section 2.4.2), and
- other entities (that are not subcontractors) on whose capacity the tenderer relies to fulfil the selection criteria.

The role of each entity involved in a tender must be clearly specified in the eSubmission application: i) sole tenderer, ii) group leader (in case of a joint tender), iii) group member (in case of a joint tender), or iv) subcontractor ⁽²⁸⁾.

For an entity on whose capacities the tenderer relies to fulfil the selection criteria (that is not a subcontractor), this role is defined in the commitment letter (*Annex 5.2*)

2.4.1. Joint tenders

A joint tender is a situation where a tender is submitted by a group (with or without legal form) of economic operators regardless of the link they have between them in the group. The group as a whole is considered a tenderer ⁽²⁹⁾.

⁽²⁸⁾ Only identified subcontractors (see Section 2.4.2) must be specified in the eSubmission application.

All group members assume joint and several liability towards the contracting authority for the performance of the contract as a whole.

Group members must appoint from among themselves a group leader (the group leader) as a single point of contact authorised to act on their behalf in connection with the submission of the tender and all relevant questions, clarification requests, notifications, etc., that may be received during the evaluation, award and until the contract signature. All group members (including the group leader) must sign an Agreement/Power of attorney drawn up in the model attached in *Annex 3*.

The joint tender must clearly indicate the role and tasks of each group member, including those of the group leader who will act as the contracting authority's contact point for the contract's administrative or financial aspects and operational management. The group leader will have full authority to bind the group and each of its members during contract execution.

If the joint tender is successful, the contracting authority shall sign the contract with the group leader, authorised by the other members to sign the contract also on their behalf via the Agreement/Power of attorney drawn up in the model attached in *Annex 3*.

Changes in the composition of the group during the procurement procedure (after the deadline for submission of tenders and before contract signature) shall lead to rejection of the tender, with the exception of the following cases:

- case of a merger or takeover of a group member (universal succession), provided that the following cumulative conditions are fulfilled:
 - the new entity is not subject to restrictive measures, has access to procurement (see Section 2.2) and is not in an exclusion situation (see Section 3.1),
 - all the tasks assigned to the former entity are taken over by the new entity member of the group,
 - the group meets the selection criteria (see Section 3.2),
 - the change must not make the tender non-compliant with the procurement documents,
 - the terms of the originally submitted tender are not altered substantially and the evaluation of award criteria of the originally submitted tender are not modified,
 - the new entity undertakes to replace the former entity for the implementation of the contract, in case of an award.
- case where a group member is subject to restrictive measures or does not have access to procurement (see Section 2.2) or is in an exclusion situation (see Section 3.1), provided the following cumulative conditions are fulfilled:
 - none of the remaining group members is subject to restrictive measures (see Section 2.2),
 - all the remaining group members have access to procurement (see Section 2.2),

⁽²⁹⁾ References to *tenderer* or *tenderers* in this document shall be understood as covering both sole tenderers and groups of economic operators submitting a joint tender.

- the remaining group members meet the selection criteria (see Section 3.2),
- the change must not make the tender non-compliant with the procurement documents,
- the terms of the originally submitted tender are not altered substantially and the evaluation of award criteria of the originally submitted tender are not modified,
- the continuation of the participation of the remaining group members in the procurement procedure does not put the other tenderers in a competitive disadvantage,
- the remaining group members undertake to implement the contract, in case of an award, without the excluded group member.

The replacement of the group member not having access to procurement or in a situation of exclusion is not allowed.

2.4.2. Subcontracting

Subcontracting is the situation where the contractor enters into legal commitments with other economic operators, which will perform part of the contract on its behalf. The contractor retains full liability towards the contracting authority for performance of the contract as a whole.

The following shall not be considered subcontracting:

- a) Use of workers posted to the contractor by another company owned by the same group and established in a Member State (“intra-group posting” as defined by Article 1, 3, (b) of [Directive 96/71/EC concerning the posting of workers in the framework of the provision of services](#)).
- b) Use of workers hired out to the contractor by a temporary employment undertaking or placement agency established in a Member State (“hiring out of workers” as defined by Article 1, 3, (c) of [Directive 96/71/EC concerning the posting of workers in the framework of the provision of services](#)).
- c) Use of workers temporarily transferred to the contractor from an undertaking established outside the territory of a Member State and that belongs to the same group (“intra-corporate transfer” as defined by Article 3, (b) of [Directive 2014/66/EU on the conditions of entry and residence of third-country nationals in the framework of an intra-corporate transfer](#)).
- d) Use of staff without employment contract (“self-employed persons working for the contractor”), without the tasks of the self-employed persons being particular well-defined parts of the contract.
- e) Use of suppliers and/or transporters by the contractor, in order to perform the contract at the place of performance, unless the economic activities of the suppliers and/or the transporting services are within the subject of this call for tenders (see Section 1.4).
- f) Performance of part of the contract by members of an EEIG (European Economic Interest Grouping), when the EEIG is itself a contractor or a group member.

The persons mentioned in points a), b), c) and d) above will be considered as “personnel” of the contractor as defined in the contract.

All contractual tasks may be subcontracted unless the procurement documents expressly reserve the execution of certain critical tasks to the sole tenderer itself, or in case of a joint tender, to a group member.

By filling in the form available in *Annex 4* (List of subcontractors), tenderers are required to:

i. give an indication of the proportion of the contract that they intend to subcontract, as well as to identify and describe briefly the envisaged contractual roles/tasks of subcontractors meeting any of these conditions (hereafter referred to as *identified subcontractors*):

- subcontractors on whose capacities the tenderer relies upon to fulfil the selection criteria as described under Section 3.2;
- subcontractors whose intended individual share of the contract, known at the time of submission, is above 20 % .

Any such subcontractor must provide the tenderer with a commitment letter drawn up in the model attached in *Annex 5.1* and signed by its authorised representative.

☞ Each tenderer shall identify *such* subcontractors and provide the commitment letters with its tender. The information must be true and correct at the time of submitting the tender. Any changes or additions regarding the envisaged subcontractors after the deadline for submission of tenders must be justified to the contracting authority.

The above rules apply also where the economic operators, which will perform part of the contract on behalf of a successful tenderer, belong to the same economic/corporate group as the sole tenderer or a member of the group submitting the joint tender.

ii. list all other subcontractors who do not meet any of the conditions above and *do not need to be identified*. Those subcontractors are **not** requested to provide a commitment letter.

Changes concerning subcontractors identified in the tender (withdrawal/replacement of a subcontractor, additional subcontracting) during the procurement procedure (after the submission deadline and before contract signature) require the prior written approval of the contracting authority subject to the following verifications:

- any new subcontractor is not subject to restrictive measures, has access to procurement if the rules on access to procurement apply also to subcontractors (see Section 2.2) and is not in an exclusion situation (see Section 3.1),
- the tenderer still fulfils the selection criteria and the new subcontractor fulfils the selection criteria applicable to it individually, if any;
- the terms of the originally submitted tender are not altered substantially, i.e. all the tasks assigned to the former subcontractor are taken over by another involved entity, the change does not make the tender non-compliant with the tender specifications, and the evaluation of award criteria of the originally submitted tender is not modified.

Subcontracting to subcontractors identified in a tender that was accepted by the contracting authority and resulted in a signed contract, is considered authorised.

2.4.3. Entities (not subcontractors) on whose capacities the tenderer relies to fulfil the selection criteria

In order to fulfil the selection criteria a tenderer may also rely on the capacities of other entities (that are not subcontractors), regardless of the legal nature of the links it has with them. It must in that case prove that it will have at its disposal the resources necessary for the performance of the contract by producing a commitment letter in the model attached in **Annex 5.2**, signed by the authorised representative of such an entity, and the supporting evidence that those other entities have the respective resources ⁽³⁰⁾.

☞ The above rules apply also where the economic operators on whose capacities the tenderer relies to fulfil the selection criteria (that are not subcontractors) belong to the same economic/corporate group as the sole tenderer or a member of the group submitting the joint tender.

2.4.4. Rules common to subcontractors and entities (not subcontractors) on whose capacities the tenderer relies to fulfil the selection criteria

If a successful tenderer intends to rely on another entity to meet the minimum levels of economic and financial capacity, the contracting authority may require the entity to sign the contract or, alternatively, to provide a joint and several first-call financial guarantee for the performance of the contract.

With regard to technical and professional selection criteria, a tenderer may only rely on the capacities of other entities where the latter will perform the works or services for which these capacities are required, i.e. the latter will either assume the role of subcontractors or will fall within the exceptions listed in Section 2.4.2 and will then assume the role of entities (not subcontractors) on whose capacities the tenderer relies to fulfil the selection criteria.

☞ Relying on the capacities of other entities is only necessary when the capacity of the tenderer is not sufficient to fulfil the required minimum levels of capacity. Abstract commitments that other entities will put resources at the disposal of the tenderer will be disregarded.

⁽³⁰⁾ This does not apply to subcontractors on whose capacity the tenderer relies to fulfil the selection criteria – for these the documentation required for subcontractors must be provided.

3. EVALUATION AND AWARD

The evaluation of the tenders that comply with the submission conditions will consist of the following elements:

- Check if the tenderer is not subject to restrictive measures and has access to procurement (see Section 2.2);
- Verification of administrative compliance (if the tender is drawn up in one of the official EU languages and the required documents signed by duly authorised representative(s) of the tenderer);
- 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 specified in the procurement documents;
- Evaluation of tenders on the basis of the award criteria.

The contracting authority will evaluate the abovementioned elements in the order that it considers to be the most appropriate.

If the evaluation of one or more elements demonstrates that there are grounds for rejection, the tender will be rejected and will not be subjected to further full evaluation. The unsuccessful tenderers will be informed of the ground for rejection without being given feedback on the non-assessed content of their tenders. Only tenderers for whom the verification of all elements did not reveal grounds for rejection can be awarded the contract resulting from this call for tenders.

The evaluation will be based on the information and evidence contained in the tenders and, if applicable, on additional information and evidence provided at the request of the contracting authority during the procedure. If any of the declarations or information provided proves to be false, the contracting authority may impose administrative sanctions (exclusion or financial penalties) on the entity providing the false declarations/information.

For the purposes of the evaluation related to exclusion and selection criteria the contracting authority may also refer to publicly available information, in particular evidence that it can access on a national database free of charge.

3.1. Exclusion criteria

The objective of the exclusion criteria is to assess whether the tenderer is in any of the exclusion situations listed in Article 136(1) of the Financial Regulation.

Tenderers found to be in an exclusion situation will be rejected.

As evidence of non-exclusion, each tenderer⁽³¹⁾ needs to submit with its tender a **Declaration on Honour**⁽³²⁾ in the model available in **Annex 2**.⁽³³⁾ The declaration must be signed by an authorised representative of the entity providing the declaration. Where the declaration has been signed by hand, the original does not need to be submitted to the contracting authority, but the latter reserves the right to request it from the tenderer at any time during the record-keeping period specified in Section 4.3.

The initial verification of non-exclusion of tenderers will be done on the basis of the submitted declarations and consultation of the [European Union's Early Detection and Exclusion System](#).

At any time during the procurement procedure⁽³⁴⁾, the contracting authority may request the documents mentioned in the Declaration on Honour as supporting evidence on non-exclusion (the documentary evidence). It may also request information on natural or legal persons that are members of the administrative, management or supervisory body or that have powers of representation, decision or control, including legal and natural persons within the ownership and control structure and beneficial owners, and appropriate evidence that none of those persons are in one of the exclusion situations referred to in Section A point (1) (c) to (f) of the Declaration on Honour.

All tenderers are invited to prepare in advance the documentary evidence, since they may be requested to provide such evidence within a short deadline. In any event, the tenderer proposed by the evaluation committee for the award of the contract will be requested to provide such evidence.

☞ If the tenderer does not provide valid documentary evidence within the deadlines set by the contracting authority, the latter reserves the right to reject the tender. In any event, in case a tenderer proposed for the award of the contract fails to comply with the above evidence requirement, its tender will be rejected, unless the tenderer can justify the failure on the grounds of material impossibility to provide such evidence.

Annex 1 specifies which of the involved entities participating in a tender need to provide the Declaration on Honour and, when requested by the contracting authority, the supporting evidence.

⁽³¹⁾ See Annex 1 which of the involved entities participating in a tender need to provide the Declaration on Honour.

⁽³²⁾ The European Single Procurement Document (ESPD) may not be used yet in European Commission's calls for tenders.

⁽³³⁾ Unless the same declaration has already been submitted for the purposes of another award procedure of the European Commission, the situation has not changed, and the time elapsed since the issuing date of the declaration does not exceed one year.

⁽³⁴⁾ The obligation to provide the supporting evidence will be waived in the following situations:

- if the same documents have already been provided in a previous award procedure of the European Commission, have been issued no more than one year before the date of their request by the contracting authority and are still valid at that date;
- if such evidence can be accessed by the contracting authority on a national database free of charge, in which case the economic operator shall provide the contracting authority with the internet address of the database and, if needed, the necessary identification data to retrieve the document;
- if there is a material impossibility to provide such evidence.

Please note that a request for evidence in no way implies that the tenderer has been successful.

3.2. Selection criteria

The objective of the selection criteria is to assess whether the tenderer has the legal, regulatory, economic, financial, technical and professional capacity to perform the contract.

The selection criteria for this call for tenders, including the minimum levels of capacity, the basis for assessment and the evidence required, are specified in the following subsections.

Tenders submitted by tenderers not meeting the minimum levels of capacity will be rejected.

When submitting its tender each tenderer shall declare on honour that it fulfils the selection criteria for this call for tenders. The model Declaration on Honour available in *Annex 2* shall be used.

The initial assessment of whether a tenderer fulfils the selection criteria will be done on the basis of the submitted declaration(s).

The subsections below specify which selection criteria evidence must be provided with the tender or may be requested later, at any time during the procurement procedure, within a deadline given by the contracting authority ⁽³⁵⁾.

The evidence must be provided in accordance with the applicable basis for assessment of each criterion: in case of a consolidated assessment – only by the involved entities who contribute to the fulfilment of the criterion, and in case of individual assessment – by each entity to whom the criterion applies individually.

In case not all selection criteria evidence is requested with the tender, all tenderers are **invited to prepare in advance the documentary evidence**, since they may be requested to provide such evidence within a short deadline. In any event, the tenderer proposed by the evaluation committee for the award of the contract will be requested to provide such evidence.

⚠ If the tenderer does not provide valid documentary evidence within the deadlines set by the contracting authority, the contracting authority reserves the right to reject the tender. In any event, in case a tenderer proposed for the award of the contract fails to comply with the above evidence requirement, its tender will be rejected, unless there is a ground for a waiver.
Please note that a request for evidence in no way implies that the tenderer has been successful.

3.2.1. Legal and regulatory capacity

Tenderers can be natural or legal persons. Tenderers are not obliged to take a specific legal form in order to submit their tenders.

⁽³⁵⁾ The obligation to provide the supporting evidence will be waived in the following situations:

- if the same documents have already been provided in a previous award procedure of the European Commission and are still up-to-date;
- if such evidence can be accessed by the contracting authority on a national database free of charge, in which case the economic operator shall provide the contracting authority with the internet address of the database and, if needed, the necessary identification data to retrieve the document.

Where tenderers submit a tender through an entity, which lacks legal personality (e.g., a branch), the compliance with the exclusion criteria, selection criteria, the rules on access to procurement as well as the absence of restrictive measures shall be assessed at the level of the tenderers.

Tenderers do not need to prove specific legal and regulatory capacity to perform the contract.

Involved entities (see Section 2.4) and all subcontractors, including those which do not need to be identified in the tender (see Section 2.4.2), must not be subject to [EU restrictive measures](#) adopted under Article 29 of the Treaty on the European Union (TEU) or Article 215 of the Treaty on the Functioning of the EU (TFEU) ⁽³⁶⁾ that constitute a legal impediment to perform the contract. This requirement will be assessed by reference to the EU restrictive measures in force. Therefore, the tenderer is not required to submit any evidence of not being subject to EU restrictive measures.

3.2.2. Economic and financial capacity

Tenderers must comply with the following selection criteria in order to prove that they have the necessary economic and financial capacity to perform the contract.

Criterion F1	
Minimum level of capacity	Average yearly turnover of the last two financial years above EUR 980 000.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. a consolidated assessment of the combined capacities of all involved entities will be carried out. (members of the group, subcontractors and other entities (that are not subcontractors)) on whose capacity the tenderer relies to fulfil the selection criteria.
Evidence	Copy of the profit and loss accounts and balance sheets for the last two years for which accounts have been closed from each concerned involved entity, or, failing that, appropriate statements from banks. The most recent year must have been closed within the last 18 months.

👉 The evidence of economic and financial capacity does not need to be provided with the tender but may be requested by the contracting authority or the *EU Validation Services* at any time during the procedure.

3.2.3. Technical and professional capacity

👉 With regard to technical and professional selection criteria, a tenderer may only rely on the capacities of other entities where the latter will perform the works or services for which these capacities are required. The entity on whose capacity the tenderer relies will either assume the role of a subcontractor or fall within the exceptions listed in Section 2.4.2.

Tenderers must comply with the following selection criteria in order to prove that they have the necessary technical and professional capacity to perform the contract.

⁽³⁶⁾ Please note that the EU Official Journal contains the official list and, in case of conflict, its content prevails over that of the [EU Sanctions Map](#).

Tenders must provide in their tender the table in Annex 2.1 of these tender specifications, exhaustively completed with all the necessary information.

T. Criteria relating to tenderers:

Criterion T1	
<p>The tenderer must prove experience in the field of economic and social analysis related to sustainability aspect of international ocean governance (e.g. expertise in environmental economics).</p>	
Minimum level of capacity	<p>At least 2 similar (in scope and complexity) peer-reviewed papers or projects completed in the last 7 years preceding the tender submission deadline, with a minimum value for each of them € 200 000 on the topic of economic and social analysis related to sustainability aspect of international governance.</p>
Basis for assessment	<p>This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out. (members of the group, subcontractors).</p>
Evidence	<p>Reference to the peer-reviewed papers shall be provided in the form of a URL if it is on the internet or a document annexed to the tender.</p> <p>A list of projects meeting the minimum level of capacity. The list shall include details of their start and end date, total project amount and scope, role and amount invoiced. In case of projects still ongoing, only the portion completed during the reference period will be taken into consideration.</p> <p>As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.</p>

Criterion T2	
<p>The tenderer must prove experience in implementing studies related to the functioning of international or intergovernmental organisations (e.g. in the field of organisation studies).</p>	
Minimum level of capacity	<p>At least 2 peer-reviewed papers or projects completed in the last 7 years preceding the tender submission deadline, with a minimum value for each of them € 200 000, on analysis of international or intergovernmental organisations published in the past 7 years preceding the tender submission deadline.</p>
Basis for assessment	<p>This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out. (members of the group, subcontractors).</p>
Evidence	<p>Reference to the peer-reviewed papers shall be provided in the form of a URL if it is on the internet or a document annexed to the tender.</p> <p>A list of projects meeting the minimum level of capacity. The list shall include details of their start and end date, total project amount and scope, role and amount invoiced. In case of projects still ongoing, only</p>

	<p>the portion completed during the reference period will be taken into consideration.</p> <p>As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.</p>
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Criterion T3

The tenderer must prove experience in **the field of international negotiations related to international ocean governance or ocean sustainability**.

Minimum level of capacity	At least 2 similar (in scope and complexity) peer-reviewed papers or projects completed in the last 7 years preceding the tender submission deadline, with a minimum value for each of them € 200 000, in the field of participation in, contributions to and/or analysis of international negotiations related to international ocean governance or ocean sustainability.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out. (members of the group, subcontractors).
Evidence	<p>Reference to the peer-reviewed papers shall be provided in the form of a URL if it is on the internet or a document annexed to the tender.</p> <p>A list of projects meeting the minimum level of capacity. The list shall include details of their start and end date, total project amount and scope, role and amount invoiced. In case of projects still ongoing, only the portion completed during the reference period will be taken into consideration.</p> <p>As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.</p>

Criterion T4

The tenderer must prove experience in the field of **international marketing and communications**.

Minimum level of capacity	At least 3 similar (in scope and complexity) projects completed in the last 7 years preceding the tender submission deadline, with a minimum value for each of them € 200 000, on building a brand, marketing and communications in an international setting.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out. (members of the group, subcontractors).
Evidence	A list of projects meeting the minimum level of capacity. The list shall include details of their start and end date, total project amount and scope, role and amount invoiced. In case of projects still ongoing, only the portion completed during the reference period will be taken into consideration.

	As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.
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Criterion T5

The tenderer must prove capacity to **plan and organise international events and meetings**

Minimum level of capacity	The organisation of at least 3 international events of at least 50 participants (involving scientists, high-level policy makers and society stakeholders with each group involved in at least one of the three events) completed in the past 7 years preceding the tender submission deadline.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out. (members of the group, subcontractors).
Evidence	<p>A list of projects meeting the minimum level of capacity. The list shall include details of their start and end date, total project amount and scope, role and amount invoiced. In case of projects still ongoing, only the portion completed during the reference period will be taken into consideration.</p> <p>As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.</p>

Criterion T6

The tenderer must prove **experience and capacity to engage and consult relevant stakeholders**

Minimum level of capacity	At least 3 similar (in scope and complexity) projects completed in the last 7 years preceding the tender submission deadline, with a minimum value for each of them € 200 000, on stakeholder engagement and/or consultation in an international setting.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out. (members of the group, subcontractors).
Evidence	<p>A list of projects meeting the minimum level of capacity. The list shall include details of their start and end date, total project amount and scope, role and amount invoiced. In case of projects still ongoing, only the portion completed during the reference period will be taken into consideration.</p> <p>As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.</p>

Criterion T7

The tenderer must prove capacity to draft reports in English.	
Minimum level of capacity	The tenderer must provide one document of at least 10 pages (report, study, peer review article, etc.) published or delivered to a client in the last 2 years in English.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities will be carried out. (members of the group, subcontractors).
Evidence	<p>The document shall be provided in the form of a URL if it is on the internet or a document annexed to the tender list of projects meeting the minimum level of capacity. The list shall include details of their start and end date, total project amount and scope, role and amount invoiced. In case of projects still on-going only the portion completed during the reference period will be taken into consideration.</p> <p>As supporting documents for each project reference the Contracting authority may request statements issued by the clients and take contact with them.</p> <p>This is not necessary if any one of the papers provided to cover for criteria T1 to T3 are in English.</p>

P. Criteria relating to the team delivering the service:

Tenderers must comply with the following selection criteria in order to prove that they have the necessary professional capacity to perform the contract.

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.

Criterion P1	
1 Project Manager	
Minimum level of capacity	One Project Manager: At least 3 years' experience in project management, including overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project of a similar size (at least € 200.000 each project) and coverage (at least 3 different countries), with experience in management of team of at least 3 people.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities (members of the group, subcontractors) will be carried out.
Evidence	CV with a list of relevant projects managed meeting the

	<p>minimum level of capacity.</p> <p>As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.</p>
Criterion P2	
Language Quality check (at least 5)	
Minimum level of capacity	Language quality check: at least 5 members of the team should have at least C1 level in the Common European Framework for Reference for Languages in English or be native speaker.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities (members of the group, subcontractors) will be carried out.
Evidence	<p>CV with relevant past experience, such as professional or academic publications, presentations or speeches and teaching in English or a language certificate demonstrating the C1 level in English, unless native speaker.</p> <p>As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.</p>
Criterion P3	
2 Experts in sustainability aspect of international ocean governance	
Minimum level of capacity	<p>Two experts in sustainability aspects of international ocean governance and related policies and negotiations with relevant academic degrees (PhD) and at least 5 years of professional experience in the field, covering environmental, economic and social aspects of sustainability, such as experts in marine environment policy, marine conservation, fisheries management, control of land-based pollution or maritime spatial planning. At least one of the experts is expected to have at least 2 years of experience on science-policy interfaces or panels either through direct participation in the work of one of them or through academic research.</p> <p>The experts shall have experience in drafting recommendations/proposals to improve policies and management.</p>

Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities (members of the group, subcontractors) will be carried out.
Evidence	CV with a list of relevant projects managed meeting the minimum level of capacity. As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.

Criterion P4

1 Expert in global environmental assessments, with a focus on the ocean sustainability

Minimum level of capacity	The expert is expected to have at least 5 years of experience on international environmental assessments with ocean or marine focus at global or regional level either through direct participation in assessment work and/or through academic study of such processes and products. The expert shall have experience in stakeholder engagement in the field.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities (members of the group, subcontractors) will be carried out
Evidence	CV with a list of relevant positions and/or responsibilities and/or projects, their duration (start-end date) and/or a list of peer-reviewed publications

Criterion P5

1 Expert in international negotiations with a focus on international ocean governance and/or ocean sustainability

Minimum level of capacity	One Expert in international negotiations (participation/ scientific support/advice to delegations/production of policy briefs) on legal regimes related to sustainability aspect of international ocean governance. The expert shall demonstrate such experience in at least three negotiation processes at international level. The expert shall have experience in drafting recommendations/proposals to improve policies and
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	<p>management.</p> <p>The expert shall have experience stakeholder engagement in the field.</p>
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities (members of the group, subcontractors) will be carried out.
Evidence	<p>CV with a list of relevant projects managed, professional experiences and peer-reviewed publications and policy briefs meeting the minimum level of capacity.</p> <p>As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.</p>
Criterion P6	
1 Expert in international marketing and communications on ocean governance	
Minimum level of capacity	One Expert in international branding, marketing and/or communications including international project delivery and client orientation experience in at least 2 projects of at least € 200.000 for each project and coverage of at least 3 countries.
Basis for assessment	This criterion applies to the tenderer as a whole, i.e. the consolidated assessment of combined capacities of all involved entities (members of the group, subcontractors) will be carried out.
Evidence	<p>CV with a list of relevant projects managed and professional experiences meeting the minimum level of capacity.</p> <p>As supporting documents for each project reference, the contracting authority may request statements issued by the clients and take contact with them.</p>

☞ All of the above-specified evidence of technical and professional capacity must be provided with the tender.

☞ The supporting documents of technical and professional capacity may be requested by the *Contracting authority* at any time during the procedure.

☞ Involved entities (see Section 2.4) and all subcontractors, including those which do not need to be identified in the tender (see Section 2.4.2), must not be subject to professional conflicting interests which may negatively affect the contract performance. Where the contracting authority has established such conflicting interests, it may conclude that the tenderer or an involved entity does not possess the required professional capacity to perform the contract to an appropriate quality standard.

The presence of conflicting interests shall be examined during the evaluation phase based on the statements made through the Declarations on Honour and, where applicable, the commitment letters (*Annex 5.1 and Annex 5.2*).

The presence of conflicting interests shall be examined also on the basis of the following information:

- no conflict of interest with the principles and actions of the IOG agenda providing a framing to this contract.

Further details and obligations concerning professional conflicting interests are set out in the draft contract.

3.3. Compliance with the conditions for participation and minimum requirements specified in the procurement documents

By submitting a tender a tenderer commits to perform the contract in full compliance with the terms and conditions of the procurement documents for this call for tenders. Particular attention is drawn to the minimum requirements specified in Section 1.4 of these specifications and to the fact that tenders must comply with applicable data protection, environmental, social and labour law obligations established by Union law, national legislation, collective agreements or the international environmental, social and labour conventions listed in Annex X to Directive 2014/24/EU.

The minimum requirements shall be observed throughout the entire duration of the contract. Compliance with these requirements is mandatory and cannot be subject to any assumptions, limitations, conditions, or reservations on the part of a tenderer.

Tenderers must declare when submitting their tenders in eSubmission whether their tenders comply with the minimum requirements specified in the procurement documents.

☞ Tenders that are not compliant with the applicable minimum requirements shall be rejected.

3.4. Award criteria

The objective of the award criteria is to evaluate the tenders with a view to choosing the most economically advantageous tender.

Tenders will be evaluated on the basis of the following award criteria and their weighting:

1. Price: 30%

The price considered for evaluation will be the total price of the tender, quoted under "A. Total price of the contract" (as per *Annex 6 - Financial offer*) covering all the requirements set out in the Tender specifications.

2. Quality: 70%

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

Quality award Criterion	Explanation of the criterion's scope	Maximum number of points per criterion (out of 100)	Minimum points to be obtained (at least 50% per criterion and 60% in total)
<i>Quality of the proposed methodology</i>	<p>This criterion will assess the quality of the proposed methodology, its coherence and its adequacy for the tasks and deliverables under the contract in order to achieve results that meet the objectives of this tender.</p> <p>The points will be allocated as follows:</p> <p>Task 1.1: relevance, quality, adequacy and effectiveness of the proposed approach (maximum 10 points - minimum 5)</p> <p>Task 1.2: quality, relevance, adequacy and effectiveness of the proposed approach (maximum 12 points – minimum 6)</p> <p>Task 2.1: quality, relevance, adequacy and effectiveness of the proposed approach (maximum 12 points – minimum 6)</p> <p>Task 2.2: quality, relevance, adequacy, effectiveness and innovation of the proposed approach (maximum 10 points – minimum 5)</p> <p>Task 3.1: quality, relevance, adequacy, effectiveness and innovation of the proposed approach (maximum 12 points – minimum 6)</p>	70 points	35 points

	<p>Task 3.2: quality, relevance, adequacy, effectiveness and innovation of the proposed approach (maximum 8 points – minimum 4)</p> <p>Task 3.3: quality, relevance, adequacy and effectiveness of the proposed approach (maximum 6 points – minimum 3)</p> <p>The tenderer shall provide a set of work packages with clear description of the objectives, method, inputs, effort (expressed as proportion of total budget), and expected outcomes.</p>		
<i>Organisation of the work and resources</i>	<p>This criterion will assess how the roles and responsibilities of the proposed team and of the different economic operators (in case of joint tenders, including subcontractors if applicable) are distributed for each task. It also assesses the global allocation of time and resources to the project and to each task or deliverable, and whether this allocation is adequate for the work.</p> <p>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. Unit costs/prices are to be included in the financial offer only.</p>	20 points	10 points
<i>Quality control measures</i>	<p>This criterion will assess the quality control system applied to the service foreseen in this tender specification concerning the quality of the deliverables, the language quality check, and continuity of the service in case of absence of the member of the team. The quality system should be detailed in the tender and specific to the tasks at hand; a generic quality system will result in a low score.</p>	10 points	5

The result of the technical evaluation is the sum of the points obtained based on the evaluation of each criterion (maximum 100 points).

Only those tenders that score:

- at least 50 % for each criterion and
- at least 60 % of the total points will be considered for the award of the contract.

Tenders not reaching the minimum quality threshold will not be further assessed. Their financial tenders will therefore not be considered for determining the cheapest reference price.

3.5. Award (ranking of tenders)

Tenders shall be ranked according to the best price-quality ratio in accordance with the formula below:

score for tender X	=	cheapest reference price	*	100	*	price weighting (30 %)	+	total quality score for all award criteria of tender X	*	quality weighting (70%)
		reference price of tender X								

Should the outcome of the formula lead to two or more tenders with the same result, the tenderer who has been awarded the highest marks for quality will be deemed to be the most economically advantageous tender. This approach will continue to be applied to each of the award criteria in the descending order listed in below until a most economically advantageous tender can be determined:

1. Quality of the proposed methodology
2. Organisation of the work and resources
3. Quality control measures

👉 The contract shall be awarded to the tender ranked first, which complies with the minimum requirements specified in the procurement documents and is submitted by a tenderer not subject to restrictive measures, having access to procurement, not in an exclusion situation and fulfilling the selection criteria.

👉 Detection of abnormally low tenders

Tenderers must be aware of Point 23 of Annex I to the Financial Regulation on abnormally low tenders and of the possibility for rejection of the tender based on it.

4. FORM AND CONTENT OF THE TENDER

4.1. Form of the tender: how to submit the tender?

Tenders are to be submitted via the eSubmission application according to the instructions laid down in the Invitation letter and the eSubmission Quick Guide available at the link below:

https://wikis.ec.europa.eu/display/FTPportal/Open+procedures_EN

👉 Make sure you prepare and submit your tender in eSubmission early enough to ensure it is received within the deadline indicated under Section IV.2.2 of the contract notice and/or on TED eTendering.

4.2. Content of the tender: what documents to submit with the tender?

The documents to be submitted with the tender in eSubmission are listed in *Annex 1*.

The following requirements apply to the technical and financial tender to be uploaded in eSubmission:

- *Technical tender.*

The technical tender must provide all the information needed to assess the compliance with Section 1.4 of these specifications and the award criteria. Tenders deviating from the minimum requirements or not covering all the requirements may be rejected on the basis of non-compliance and not evaluated further.

For the appraisal, the written submission shall include a clear and detailed description of the organisation, resources and methodology proposed. Tenderers will provide a practical and detailed description of the resources and services proposed to achieve the objectives and results set out in *Section 1.4* above.

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, i.e. the allocation should be indicated for each tasks and should specify the role, the names and the estimated number of days/units for each member of the team. This is not a request for a budget, as the budget should be only part of the financial offer.

- *Financial tender.*

A complete financial tender, including the breakdown of the price, needs to be submitted. For this purpose, the Financial Model in *Annex 6* shall be used.

The financial tender shall be:

- expressed in euros. 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.
- quoted free of all duties, taxes and other charges, i.e. also free of VAT.

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

👉 The European Union Institutions are exempt from such charges in the EU under Articles 3 and 4 of the Protocol on the Privileges and Immunities of the European Union of 8 April 1965 annexed to the Treaty on the Functioning of the European Union. Exemption is granted to the Commission by the governments of the Member States, either through refunds upon presentation of documentary evidence or by direct exemption.

In case of doubt about the applicable VAT system, it is the tenderer's responsibility to contact its national authorities to clarify the way in which the European Union is exempt from VAT.

4.3. Signature policy: how can documents be signed?

Where a document needs to be signed, the signature must be either hand-written or, preferably, a qualified electronic signature (QES) as defined in [Regulation \(EU\) No 910/2014 on electronic identification and trust services for electronic transactions in the internal market \(the eIDAS Regulation\)](#).

Tenderers are strongly encouraged to sign with a QES ⁽³⁷⁾ all documents requiring a signature and only exceptionally to sign such documents by hand as hand-written signatures lead to an additional administrative burden for both the tenderer and the contracting authority. The originals of any hand-signed documents (other than the contract) do not need to be submitted to the contracting authority but the tenderer must keep them for a period of five years starting from the notification of the outcome of the procedure or, where the tenderer has been awarded a contract resulting from this call for tenders and the contract has been signed, the payment of the balance.

All documents must be signed by the signatories (when they are individuals) or by their duly authorised representatives.

For the following documents, when signed by representatives, tenderers must provide evidence for the delegation of the authorisation to sign:

- The Declaration on Honour of the tenderer (in case of a joint tender – the Declarations on Honour of all group members) **Annex 2**;
- (in the case of a joint tender) the Agreement/Power(s) of attorney drawn up using the model attached in **Annex 3**.

The delegation of the authorisation to sign on behalf of the signatories (including, in the case of proxy(-ies), the chain of authorisations) must be evidenced by appropriate written evidence (copy of the notice of appointment of the persons authorised to represent the legal entity in

⁽³⁷⁾ See [here](#) how to apply a QES on a document exchanged with a European institution, body or agency.

signing contracts (together or alone), or a copy of the publication of such appointment if the legislation which applies to signatory requires such publication or a power of attorney). A document that the contracting authority can access on a national database free of charge does not need to be submitted if the contracting authority is provided with the exact internet link and, if applicable, the necessary identification data to retrieve the document.

4.4. Confidentiality of tenders: what information and under what conditions can be disclosed?

Once the contracting authority has opened a tender, it becomes its property and shall be treated confidentially, subject to the following:

- For the purposes of evaluating the tender and, if applicable, implementing the contract, performing audits, benchmarking, etc., the contracting authority is entitled to make available (any part of) the tender to its staff and the staff of other Union institutions, bodies and agencies, as well to other persons and entities working for the contracting authority or cooperating with it, including contractors or subcontractors and their staff, provided that they are bound by an obligation of confidentiality.
- After the signature of the award decision, tenderers whose tenders were received in accordance with the submission modalities, who are not subject to restrictive measures, have access to procurement, who are not found to be in an exclusion situation referred to in Article 136(1) of the FR, who are not rejected under Article 141 of the FR, whose tenders are not found to be incompliant with the procurement documents, and who make a request in writing, will be notified of the name of the tenderer to whom the contract is awarded, the characteristics and relative advantages of the successful tender and its total financial tender amount. The contracting authority may decide to withhold certain information that it assesses as being confidential, in particular where its release would prejudice the legitimate commercial interests of economic operators or might distort fair competition between them. Such information may include, without being limited to, confidential aspects of tenders such as unit prices included in the financial tender, technical or trade secrets ⁽³⁸⁾.
- The contracting authority may disclose the submitted tender in the context of a request for public access to documents, or in other cases where the applicable law requires its disclosure. Unless there is an overriding public interest in disclosure ⁽³⁹⁾, the contracting authority may refuse to provide full access to the submitted tender, redacting the parts (if any) that contain confidential information, the disclosure of which would undermine the protection of commercial interests of the tenderer, including intellectual property.

👉 The contracting authority will disregard general statements that the whole tender or substantial parts of it contain confidential information. Tenderers need to mark clearly the information they consider confidential and explain why it may not be disclosed. The contracting authority reserves the right to make its own assessment of the confidential nature of any information contained in the tender.

⁽³⁸⁾ For the definition of trade secrets please see Article 2 (1) of [Directive \(EU\) 2016/943 on the protection of undisclosed know-how and business information \(trade secrets\) against their unlawful acquisition, use and disclosure](#).

⁽³⁹⁾ See Article 4 (2) of the [Regulation \(EC\) No 1049/2001 regarding public access to European Parliament, Council and Commission documents](#).

APPENDIX: LIST OF REFERENCES

<i>Award criteria</i>	See Section 3.4
<i>Contracting authority</i>	See Section 1.1
<i>Entities on whose capacities the tenderer relies to fulfil the selection criteria</i>	See Section 2.4.3
<i>EU Validation services</i>	See Section 2.3 EU Grants and Tenders Rules on Legal Entity Validation, LEAR appointment and Financial Capacity assessment
<i>Exclusion criteria</i>	See Section 3.1
<i>Financial Regulation</i>	Regulation (EU, Euratom) 2018/1046 of the European Parliament and of the Council of 18 July 2018 on the financial rules applicable to the general budget of the Union
<i>Group leader</i>	See Section 2.4.1
<i>Group member</i>	See Section 2.4.1
<i>Identified subcontractors</i>	See Section 2.4.2
<i>Involved entities</i>	See Section 2.4
<i>Joint tender</i>	See Section 2.4.1
<i>Participating entities</i>	See Section 1.1
<i>Participant Register</i>	See Section 2.3 https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register
<i>Selection criteria</i>	See Section 3.2
<i>Sole tenderer</i>	See Section 2.4
<i>Subcontracting/subcontractor</i>	See Section 2.4.2
<i>Treaties</i>	The EU Treaties: https://europa.eu/european-union/law/treaties_en

ANNEXES

Annex 1 - List of documents to be submitted with the tender or during the procedure

Annex 2 - Declaration on honour on exclusion and selection criteria

Annex 2.1 – Technical and professional capacity

Annex 3 - Power of attorney

Annex 4 – List of subcontractors

Annex 5.1 - Commitment letter by an identified subcontractor

Annex 5.2 - Commitment letter by an entity on whose capacities is being relied

Annex 6 - Financial offer form

Draft service contract and Annexes