Call for tenders

Terms of reference

Targeted Analysis Project

“Orientations for the development of an Atlantic Macro-Region (AtlanticMRS)”

Technical and administrative
Terms and conditions

ESPON EGTC
20 December 2023

Implementation Framework: The Single Operation within the ESPON 2030 Cooperation Programme implemented by the ESPON EGTC. The ESPON 2030 Monitoring Committee approved the Single Operation on 26 September 2022. The Single Operation is co-financed by the European Regional Development Fund via the ESPON 2030 Cooperation Programme.

This document details both the technical and administrative terms and conditions including its annexes and constitutes the dossier of this call for tenders. Its original is kept in the contracting authority's records and is the only version that is deemed authentic.
# Key Information on the Procurement

<table>
<thead>
<tr>
<th><strong>Title</strong></th>
<th>Orientations for the development of an Atlantic Macro-Region (AtlanticMRS)</th>
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<td><strong>Procedure</strong></td>
<td>EU Open</td>
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| **Contracting authority** | ESPON EGTC  
11, Avenue John F. Kennedy L-1855 Luxembourg  
Grand Duchy of Luxembourg |
| **Type of contract** | Service contract |
| **Duration** | 14 months (11 months for contract implementation + 3 months for administrative closure) |
| **Maximum available budget** | EUR 250.000 (excluding VAT) |
| **Place of delivery** | Luxembourg |
| **Lots** | This tender is not divided into lots |
| **Variants** | Not permitted |
| **Market access** | Participation in this tender is open to all economic operators established in the European Union, the European Economic Area and third countries signatories to international agreements in the field of public procurement by which the EU is bound |
| **Tender submission method** | Electronic submission via the Luxembourg Public Procurement Portal (www.pmp.lu) |
| **Deadline for sending requests for information And/or reporting errors, omissions, ambiguities, or discrepancies** | 12 February 2024 at 9h59 CET |
| **Deadline for submission of tenders** | 19 February 2024 at 10h00 CET |
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1 What is to be done? (Purpose of the contract)

With this call for tenders for Targeted Analysis, the ESPON EGTC intends to conclude a service contract for the provision of a Targeted Analysis which aims at further building up ESPON's stock of research development and enhancing the territorial evidence production in the framework of the ESPON 2030 Cooperation Programme. The Targeted Analysis is being implemented within the framework of the Thematic Action Plan (TAP) "Governance of new geographies". This ESPON TAP aims to boost tailored multi-level governance mechanisms addressing different type of functional areas and to improve capacities of spatial planning authorities and involved stakeholders.

The geographical focus of this targeted analysis is on the Atlantic Area, comprised of regions from Ireland, France, Spain and Portugal and the United Kingdom1. The service contract shall support the efforts for building a common development vision for the Atlantic Area, vision that should serve to strengthen the territorial cooperation among regions. It shall contribute to reducing obstacles to a common sustainable territorial development and to strengthening actions aiming at coping with common territorial challenges, and thereby supporting actions to further defining the contours of an Atlantic Macro-Region.

1.1 Context

Stakeholders’ context

The Atlantic is comprised of territories with different socio-economic characteristics, rich cultural and natural features, with a longstanding cooperation tradition. In 1989, the Faro Declaration created CPMR Atlantic Arc Commission to overcome development imbalances, peripherality, and the maritime economy weakening. With the creation of other Atlantic associations (Atlantic Cities, RTA-ATN, les Ceser de l'Atlantique), the Interreg Atlantic Area programme and the Atlantic Strategy, the Atlantic community has enhanced collaborations.

Linking with the current Atlantic Maritime Strategy, the Atlantic Arc Commission voted in December 2020 for a Political Declaration asking the Council to issue a mandate to the European Commission to create an Atlantic Macro-Region2. It has worked hand in hand with the European Parliament, which supports this proposal in its report “Towards a new approach to the Strategy for the Atlantic” voted in September 2021, as well as with the Atlantic Member States, which have met on several occasions, notably in the context of the General Assembly in June 2021 and May 2022. In line with these discussions, the French, Spanish and Portuguese Secretaries of State agreed to jointly analyse the benefits of creating the Atlantic Macro-Region, in a Trilateral Declaration agreed on 5 November 2021.3 The Spanish Presidency of the Council in accordance with the interested Member States agreed to launch the work towards the elaboration of a mandate on the creation of the Atlantic Macro-Region during the General Affairs Council held on 12 December 2023.

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1 Although not a member of the ESPON203 Cooperation Programme, United Kingdom is geographically part of this broad Atlantic area. Against that backdrop, when feasible and data freely available, the study shall also cover the United Kingdom.


In parallel, the Atlantic Network of Chambers of Commerce adopted a Declaration in favour of the Atlantic Macro-Region⁴ (June 2023) and Les CESER de l'Atlantique published a Study⁵ expressing their perspective on the creation of the Atlantic Macro-Region (November 2023).

This unique territory has important potentials for the dynamic development but is facing major challenges at various levels including at the (intra and extra) EU, national, regional and local levels as well as in cross-border areas. Among the component regions there are strong flows of people and goods, and strong (inter) dependences that cover both maritime and territorial issues. The Atlantic area territorial trends and challenges are cross-border in nature and require cooperation across administrative levels, in order to tackle challenges in the fields of social cohesion, climate change adaptation, economic development, energy production/transportation, mobility and transport, for example.

The Atlantic Area is characterised by three different features:

- **The sea** which links the Atlantic territories bringing development opportunities, but which is also a fragile space that needs to be protected, from an ecological point of view.
- **A peripheral area** that has accentuated its status with the withdrawal of the United Kingdom from the EU; this area is characterised by land-sea connections ensured by port hinterland connections and doubled by interconnected urban networks, offering the potential for developing a dynamic space on the outskirts of the EU.
- **'Sub-spaces' with specific issues**: such as the English Channel or the Irish Sea, cross-border regions like the Working Community of the Pyrenees, or the outermost regions of Macaronesia.

The diverse phenomena affecting and shaping the Atlantic area, the multitude of flows and relationships, and the global interconnections need to be analysed beyond administrative boundaries. This is a precondition to design more effective, operative development policies in such a complex European regional context. And, as highlighted in the official documents, the added value of macro-regional strategies lies directly in their cross-sectoral approach, transnational dimension and contribution to improved multi-level governance.

In July 2020 Communication of the European Commission on a new Atlantic Strategy Action Plan 2.0 has set new priorities for cooperation in the Atlantic, taking into account the Green Deal⁶. However, several institutions such as the European Parliament and the Committee of the Regions have identified limits and calls to bring adjustments to the AAP2.0. In particular, they both highlighted the shortcomings of the AAP2.0 when it comes to the priorities of cooperation as only focused on the maritime challenges and their interest to see the European Council take political ownership over the creation of an Atlantic Macro-Region.

This overlaps with the several cumulated effects of the Brexit, the Covid-19 pandemic and of the geopolitical instability caused by the war in Ukraine, challenging and putting the Atlantic cohesion under severe pressure.

Developing a Targeted Analysis on the Atlantic Macro-Region would allow to identify concrete steps for the achievement of the EU Green Deal without leaving any Atlantic territory behind, a key principle of the EU Cohesion policy. In the context of RepowerEU Plan, Farm-to-Fork and EU Biodiversity Strategy, in which the Commission intends to reinforce the EU energy sovereignty, EU food security, and preserve

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⁴ Declaration of the Chambers of Commerce of the Atlantic Arc – CPMR Atlantic Arc Commission (cpmr-atlantic.org)
⁵ Etude « Macro-région Atlantique, une chance à saisir ? Regards croisés des CESER de l'Atlantique ». - Conseil économique social environnemental (paysdelaloire.fr)
⁶ With the Green Deal (December 2019), the European Commission has set its objectives to transform the EU into a modern, resource-efficient and competitive economy, ensuring that no net emissions of greenhouse gases by 2050, economic growth decoupled from resource use, and no person and no place left behind.
European ecosystems, it is important to assess how the Western part of Europe can bring its contribution, for the benefit of the whole EU. It will also enable to better focus and deploy EU funding opportunities (for the programming period 2021-2027: Next Generation EU, i3, etc.) towards tackling Atlantic challenges.

A **Macro-Region** is a cross-border area bringing together several European countries or regions around shared challenges, supported by the EU in the framework of a jointly defined territorial strategy. This strategy aims to motivate initiatives and projects that contribute to a balanced development of the macro-regional territory. The added value of macro-regional strategies is characterised by their cross-sectoral approach, transnational dimension and contribution to improved multi-level governance. A Macro-Region has no dedicated EU funds and no specific structure or legal status. It is intended to optimise the funding already available in each country, and to pool and synergise initiatives for better integration of the territory. EU macro-regional strategies are initiated and requested through the European Council by the relevant Member States located in the same geographical area. After a request from the European Council, the strategies are developed and adopted by the European Commission.²

Within the European Union four main macro-regions are recognised³, where the adopted macro-regional strategies aim to foster cooperation, address common challenges, and promote sustainable development in specific geographical areas:

**The Baltic Sea Region**: encompasses countries surrounding the Baltic Sea, including Denmark, Estonia, Finland, Germany, Latvia, Lithuania, Poland and Sweden. It focuses on environmental sustainability, economic development, innovation, and cooperation in areas like transport, energy, and culture.

**The Danube Region**: covers countries along the Danube River, such as Austria, Bulgaria, Croatia, Czech Republic, Germany, Hungary, Romania, Slovakia, Slovenia, and some parts of other neighbouring countries. Objectives include promoting economic growth, improving connectivity, environmental protection, and enhancing cultural exchange and tourism.

**The Adriatic-Ionian Region**: Includes countries bordering the Adriatic and Ionian Seas, like Italy, Slovenia, Croatia, Bosnia and Herzegovina, Montenegro, Albania, Greece. Objectives are centred around sustainable development, economic growth, tourism, maritime safety, and environmental protection.

**The Alpine Region**: Comprises countries with the Alps mountain range, such as Austria, France, Germany, Italy, Liechtenstein, Slovenia, and Switzerland. Objectives involve sustainable economic development, innovation, environmental conservation, tourism, and transportation infrastructure.

### 1.2 Objective

The objective of this targeted analysis is twofold: 1) to deliver high quality research and create new evidence on territorial development challenges and opportunities for the Atlantic area in relation to the topics listed below and 2) to provide recommendations for policymakers that will facilitate a common understanding on how to cooperate further in the area, beyond the current existing frameworks (in particular that of the Atlantic Strategy), and that will enable policymakers to build the best Atlantic macro-regional strategy, assessing existing and future governance mechanisms ensuring the involvement of regional, local authorities and civil societies. As identified by the Atlantic Regions member of CPMR in

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their Cardiff Political Declaration, the main priorities for inclusion within the Atlantic Macro-Region strategy are:

- An Innovative and Sustainable Atlantic Economy;
- An inter-connected Atlantic Area;
- An Atlantic Area resilient to climate change;
- The Social and Cultural Cohesion of the Atlantic Area.

Thus, in relation to the needs and priorities, the following themes shall be addressed within this targeted analysis, but not limited to:

- social and cultural opportunities and cohesion;
- land-sea interactions; economic potential (blue and green sectors most identified in Atlantic regions Smart Specialisation Strategies, in particular) and the relation with the education sector in achieving the EU green transition objectives;
- mobility and transport: rail connectivity and bottlenecks, multimodal networks, sea motorways in the Atlantic, new connections between ports, etc.;
- energy production, complementarities of Atlantic ports to support the development of renewable energies, energy storage and transport;
- digital connections and infrastructures;
- vulnerability to climate change and conservation of common natural heritage or specific biodiversity;
- areas of cooperation via EU programmes / initiatives / agreements with national - regional – local stakeholders and the use of EU funding instruments.

In a complex landscape of multiple institutions and interactions, this ESPON targeted analysis will serve as a joint basis for an ever-closer cooperation and coordination among stakeholders. It sets out to contribute to the ongoing discourse around the potential of a macro-regional strategy that has gained momentum over recent years and shall be shared by responsible decision-makers.

Thus, the project should answer the following policy questions:

- What are the common and specific challenges for the different types of territories that characterize the Atlantic area? How to overcome these challenges?
- How can the opportunities and potentials be more efficiently exploited for the economic and social development, and achieving the Green Deal objectives?
- How to improve the governance structures through joint cooperation actions at different levels, and guarantee the ownership of all the relevant Administrations and the involvement of the stakeholders?
- What recommendations can be given for policymakers at different levels to: support the sustainable development of the Atlantic area within a macro-regional approach; and to enhance territorial cooperation and good governance practices (e.g Baltic BSR S3 Directors’ Network) between authorities in the area and also with the EU?

The geographical coverage of the project should encompass all coastal regions of the Atlantic area\(^9\), at the NUTS II level, namely:

• France: Normandie, Bretagne, Pays de la Loire, Nouvelle Aquitaine;
• Ireland (all): Northern and Western, Eastern and Midland, Southern;
• Portugal (all): Norte, Centro, Alentejo, Área Metropolitana de Lisboa e Vale de Tejo, Algarve, Azores, Madeira;
• Spain: Comunidad Foral de Navarra, País Vasco, Cantabria, Asturias, Galicia, Andalucía, Canarias;
• United Kingdom maritime NUTS2 regions will be considered as long as relevant data is immediately and freely available.

**Stakeholders’ envisaged use of the Targeted Analysis**

Stakeholders will make use of the expected outcome in the following ways:

• The Targeted Analysis will help participating organisations to nurture their individual work to build up their views on the Atlantic Macro-Region. It will enable the assessment of the functioning of the current Atlantic Maritime Strategy and of the added value of the Atlantic macro-region project.

• In particular, the results of the Targeted Analysis will be used to feed the future Political Declaration of the CPMR Atlantic Arc Commission, that will be discussed and voted in the next Atlantic Arc General Assembly. These will also be used by the members of the steering committee in their contacts with National Governments on the creation of the Atlantic Macro-Region.

• The Targeted Analysis will also complement the work done within the on-going study of RTA_ATN and Ceser de l’Atlantique, study bringing the perspective of the civil society for the Atlantic Macro-Region.

• It is expected that more synergies will be created due to the targeted analysis, bridging the works of all the Atlantic associations of local and regional authorities, enabling a cross-sectoral and transnational policy dialogue for the shared vision of the Atlantic development.

• The results will be shared by CPMR with the Atlantic forums, bringing an integrated perspective and uptake.

• The results will also be of use for regional and local policymakers involved in development initiatives, bringing a better understanding on cooperation policies and improving the use of EU programmes.

**1.3 Description of tasks**

In pursuing the objectives and outputs outlined above, the following tasks shall be carried out within the framework of this Targeted Analysis. Tenderers are requested to describe how they intend to implement the following them, to include in their proposal a description of their foreseen organisation and planning, to detail the proposed deliveries and to explain how the necessary resources shall be broken down between the different tasks. When relevant, tenderers are invited to consider the possibility to run some of the tasks in parallel.

For the implementation of the subsequent tasks, the existing resources available within ESPON (available on www.espon.eu: BT2050, TEVI2050, ALPS2050, MRS ESPON, ESPON TITAN, etc.), INTERREG Atlantic Area (“Summary of main joint challenges” developed in the 2021-2027 programme), the Atlantic Action Plan
2.0, the Committee of the Regions and European Parliament reports on the Atlantic Strategy, existing regional strategies (Regional Smart Specialisation Strategies, Regional Operational Programmes, etc.), the CPMR Atlantic Arc Technical Papers, as well as other sources of socio-economic data (Eurostat, the Maritime Hub or TEN-TEC databases) are to be consulted and analysed. Further data will be accessible via the support of different networks of Atlantic Stakeholders engaged in the Targeted Analysis.

The Study\(^\text{10}\) of Le CESER de l’Atlantique and the Declaration\(^\text{11}\) of the Atlantic Network of Chambers of Commerce will also be two reference documents. Simultaneously, due to the transnational nature of the Targeted analysis, opportunities to learn from peers will be key to building a common vision of the Atlantic development.

### 1.3.1 Task 1: Analyse and map current socio-economic and environmental patterns and trends on selected topics using sub national data (NUTS 2 level) and develop an interactive atlas

The main aim of this subtask is to collect relevant territorial evidence to create an up-to-date picture of the economic, social and environmental state, and to identify main development trends in the Atlantic area, looking at sea-land interactions as well.

The following topics are priority for the analysis (long term series should be used when data is available):

- **Social and cultural cohesion** (e.g. tertiary and vocational educational training relevant for the Atlantic area; cooperation between the education sector, research centres, clusters and industries to achieve the green transition; sustainable tourism; etc.).

- **Economy and dominant sectors**, with focus on most common regional economic sectors of specialisations (RIS3), their importance for the development of the region and missing links in the Atlantic value chain (e.g. innovative green vessels, renewable energies/ floating offshore wind, circular economy value chain, complementarities between Atlantic ports’ activities).

- **Transport and mobility connections and planning**, missing transport links for a well-connected and multimodal transport network in the Atlantic Area.

- **Digital and energy infrastructure and connectivity**, at the intra-regional level as well as in the relation to neighbouring countries and in the European context (e.g. infrastructure needs for the future, green hydrogen corridor potential, offshore renewable energies/ floating offshore wind, etc.).

- **Climate change impacts on biodiversity and ecosystem resilience**, co-management of land, coastal and maritime areas, conservation of common natural heritage or specific biodiversity, etc.

The service provider is expected to identify the main factors and drivers that led to the current situation. Therefore, it is important to understand the level of interconnectedness, reflecting possible synergies and conflicts between the themes, taking an integrated and cross-sectoral approach.

The involvement of the steering committee (see 1.5. below) in the validation of the analysis carried out in this task is crucial. Simultaneously, the stakeholder institutions are determined to support the work on the targeted analysis, providing access to data and documents, in addition to the official sources (Eurostat, ESPON database, NSIs, etc.). Thus, it is crucial to identify the data gaps at an early stage in the project implementation and to propose a plan to overcome data shortcomings.

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\(^{10}\) **Etude « Macro-région Atlantique, une chance à saisir ? Regards croisés des CESER de l’Atlantique ». - Conseil économique social environnemental (paysdelaloire.fr)**

\(^{11}\) **Declaration of the Chambers of Commerce of the Atlantic Arc – CPMR Atlantic Arc Commission (cpmr-atlantic.org)**
The results of the above shall be presented in the form of an interactive atlas. It shall compile a set of maps, infographics and illustrations showing territorial evidence on the state, trends and perspectives for the Atlantic area and its regions within the different thematic fields analysed. The variety of maps, easily readable and policy relevant, should be accompanied by a text description, presenting the key challenges and policy implications, identifying determinants and opportunities for the socio-economic and territorial development.

The interpretation of maps and illustrations included in the Atlas should be made in a highly communicative and understandable way for policy makers and practitioners. They shall be subject of in-depth discussion with the steering committee members.

The Atlas should be consistent with the corporate identity and design guidelines of the ESPON programme and respective templates to be provided by the ESPON EGTC to the selected service provider and it shall be developed within the ESPON portal, accessible in a user-friendly and interactive way.

It should be possible to access, search, navigate (e.g. pan, zoom, reset) and visualise the various elements of the Atlas (i.e. maps, text, supporting data and information) in an interactive way. Moreover, it should also be possible to download all datasets and maps included in the Atlas, including spatial data. The tender should include a draft proposal on the structure and examples of visualisation elements to be included in the Atlas. The different forms of visualisation are also to be agreed with the steering committee.

1.3.2 Task 2: Analysis of the obstacles hampering and identification of potential areas for cooperation among Atlantic territories

The main aim of this task is twofold: first, to identify the obstacles that have hampered the coordination between levels of governance and second, to identify the best governance scheme suitable to solve common development challenges of the Atlantic area and in achieving a common vision for sustainable development.

This task should identify the institutional frameworks and the governance structures to better facilitate the networking and involvement of various actors and stakeholders, as well as civil society organisations in developing appropriate and innovative governance solutions for territorial cooperation. These multiple relevant authorities, institutions and cooperation initiatives shall be synthesised and mapped, including descriptions of the respective governance, thematic fields of action and ongoing processes of territorial cooperation. This will provide a synthetic overview of the multi-level territorial governance setting in which territorial cooperation in the Atlantic area is embedded.

The implementation of this task requires an active involvement of different types of stakeholders through a participatory process. A short survey/interviews with key players should be conducted; the list for these should be agreed in the kick-off meeting.

In addition, this task shall identify good practices (3-5) / enable peer to peer knowledge transfer, in different thematic fields involving coordinated policies and actions based on a set of criteria (to be discussed and validated with the stakeholders in a participatory workshop). The identification and discussion of good practices should enable a more comprehensive preparation of responses to the problems and challenges by involving multi-level governance structures and existing instruments at different levels.
The results of this task shall provide knowledge and tools to stakeholders on how to strengthen cooperation considering the existing institutional and legal framework in the targeted territory but also at EU level. The participatory approach to be developed by the service provider needs to be approved by the steering committee and a draft proposal shall be presented in the tender.

Outcomes shall be presented in text form (i.e. a report), accompanied by interactive visualisations when relevant (e.g. storymaps, dashboards, infographics), to be developed within the ESPON portal. The different forms of visualisation are to be agreed with the ESPON EGTC in the course of the project's implementation.

1.3.3 Task 3: Policy recommendations to support policy decisions, on all levels of governance, in the orientation to give to the Atlantic Macro-Region

The main aim of this task is to provide guidance and support policymakers, on all levels, and orientate policy decisions in achieving a shared and common vision for the Atlantic Macro-Region. As this task constitutes the conclusive part of this project, respecting the evidence-based principles, should provide recommendations to policymakers: 1) on how to contribute to the (long-term) sustainable socio-economic and territorial development in the Atlantic area and 2) on how to implement joint actions in the thematic areas of cooperation, through multi-level governance approach.

The recommendations should be drafted taking into account: the specificities of the different territories within the Atlantic area; the main territorial development trends and challenges and the potentials to enhance territorial cooperation and good governance practices.

The recommendations to be produced should be ‘actionable’ and should allow to identify concrete steps for the achievement of the sustainable territorial development of the Atlantic area. It could take the shape of a Tree of objectives with intermediary actions on a multi-annual basis. It should also consider the role of the Atlantic area in the broader EU context of the Green Deal, RepowerEU Plan, Farm-to-Fork and EU Biodiversity Strategy, in which the Commission intends to reinforce the EU energy sovereignty, EU food security, and preserve European ecosystems; and should enable a better focus of EU funding opportunities towards Atlantic challenges, for the programming period 2021-2027. This task requires an active involvement and participation of the steering committee and other stakeholders.

The results of this task shall be presented in a form of a handbook accompanied by interactive maps and visualisations (e.g. storymaps, dashboards, infographics), to be developed within the ESPON portal. The different forms of visualisation are to be agreed with the ESPON EGTC in the course of the project's implementation.

1.4 Expected outputs and deliveries

The following outputs and deliveries shall be provided covering the tasks of the requested service as specified above in section 1.3.

1.4.1 Expected outputs

By responding to the research questions, the project contributes to the CPMR Atlantic Arc activities and will be used by the Atlantic Regions member of CPMR, and Atlantic associations of local and regional authorities. This will allow for a better adjustment of the activities to the specific conditions and challenges identified in this targeted analysis, resulting in a place-based approach that takes into account
in an integrated way the social, cultural, economic and geopolitical conditions of this area. The main outputs of the service shall be, (and in line with the Atlantic macro-region project):

- The territorial analysis (from a cross-sectoral perspective), mapping current and projected socio-economic and environmental patterns and trends using subnational data (NUTS 2 level).
- The interactive atlas on determinants and opportunities for the socio-economic and territorial development of the Atlantic area.
- The analysis of missing cooperation links and identification of potential areas for cooperation among Atlantic territories.
- The recommendations to support and guide policy decisions, on all levels of governance.
- Data and interactive maps and graphs resulting from the research and provided in the format compatible with the environment of the ESPON Portal\(^\text{12}\).

1.4.2 Deliveries

The technical offer shall include a description of the format and the content of all deliveries according to the methodological concept the tenderer proposes to implement. The technical offer shall also indicate to which task(s) each delivery is referring to.

The selected service provider is requested to submit at least 3 predefined deliveries, linked to foreseen payments in the contract (2 interim and 1 final payment):

- One inception delivery.
- One progress report.
- One final delivery.

The table presented in section 1.5 below indicates the time schedule for these predefined deliveries.

The technical offer shall indicate the time schedule for all other intermediary deliveries that have to be proposed by the tenderer.

During the contract implementation, based on the project's progress, risk assessment, stakeholders' inputs and service provider's performance, the contracting authority may request an adaptation of the time schedule and the content of the proposed intermediary deliveries.

1.4.2.1 Predefined deliveries

1. An inception delivery containing at least:

- Report (approximately 20 pages, excluding annexes) including:
  - Further description of the methodological framework to be applied.
  - Elaborated proposal for the participatory approach to the consultation process with the key European, national, regional and local stakeholders, to be implemented in the various tasks.
  - Overview and evaluation of validity and reliability of data and data sources to be used. A plan for overcoming potential challenges in relation to data collection and missing data.
  - Draft framework of the interactive atlas (including visual examples).

\(^{12}\) https://gis-portal.espon.eu/arcgis/apps/sites/#!/espon-hub
• Work plan presenting the next steps foreseen in the project's implementation, including meetings with selected target groups.
• Description of the format and content of all foreseen intermediary deliveries.

2. **A final delivery containing at least:**

- Final main report (40 to 80 pages) including:
  - Final version of the analysis and evidence from the mapping and analysis of development trends.
  - Final version of the analysis and evidence from the mapping and analysis of multi-level governance mechanisms.
  - A handbook with recommendations to policymakers at different geographical levels for future joint policy actions at the economic development and sustainable development of the Atlantic area (cf. task 4).
- The interactive atlas on determinants and opportunities for the socio-economic and territorial development of the Atlantic area.
- Presentation of the research results in the format and specific form agreed with the ESPON EGTC and - whenever related to maps and other interactive forms of data visualisation - compatible with the environment of the ESPON Portal.
- Data, maps and figures:
  - Source files for the maps and figures (incl. map project/design and vector formats).
  - Shapefiles, geodatabase(s), for all the static and interactive web-maps, dashboards or apps.
  - Data gathered according to the ESPON metadata template, corresponding to the principles of ESPON data strategy and integration of the collected data in the ESPON database, in cooperation with the ESPON EGTC.

3. **One progress report**

In addition to the above, the service provider will be requested to submit one progress report, corresponding to foreseen interim payment in the contract. This brief report (max. 10 pages) shall provide an overview on the progress of the implementation of the project, highlighting the status of the different tasks and the challenges and risks associated for the good achievement of the research. Furthermore, the report shall list the meetings held and the intermediary deliveries submitted between the progress reports.

The service provider will receive written feedback from the ESPON EGTC on each mandatory delivery (inception, final and progress report) including approval or request for revision and/or addressing identified challenges (indicatively within two weeks after receiving them and one month for the final delivery).

1.4.2.2 **Intermediary deliveries**

In addition to the predefined deliveries, service providers are expected to provide intermediary deliveries. These can take different forms, depending on the profile and content of the requested tasks. Their exact quantity, format and content shall be proposed in the technical offer, then agreed between the ESPON EGTC and the service provider at the kick off meeting. They shall be submitted on a scheduled

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13 This involves the concise and easy-to-grasp summary of overall research findings in an analogue or digital format by means of (a non-exhaustive list of forms): policy brief, infographics, dashboard, story map, simple video clip, apps, etc.)
basis corresponding to the progress of the implementation of the different tasks described above (see sections 1.3).

While leaving freedom to the tenderers to define the intermediary deliveries in their technical offer, the compulsory element of the intermediary deliveries are:

- the data resource that shall be steadily acquired processed and submitted to the ESPON EGTC, a detailed overview of the data collection process and data structure, and adjustments related to the data strategy when necessary (see dedicated section about data delivery process below) and status of ongoing stakeholder engagement.
- draft version of the interactive atlas on determinants and opportunities for the socio-economic and territorial development of the Atlantic area.

The service provider will receive feedback from the ESPON EGTC on each delivery.

1.4.2.3 Data delivery process and digital deliveries

Data and data visualisations are an integral part of all the above-mentioned deliveries. When it comes to data deliveries, it is important to document and provide associating metadata and all the data possible that would allow to reproduce the results. It is important to keep the potential reuse of data in mind when collecting and structuring them, therefore, detailed spatiotemporal granularity is important. Visualisations need to be adapted both for static representation in reports as well as interactive web-based content. The project is expected to deliver both static and interactive web-based maps and figures, when relevant also dashboards, applications or similar, suitable for ESPON website and Portal.

The delivery of data and (web)maps and/or any other relevant interactive content mentioned above shall be delivered and integrated throughout the implementation of the project as they are completed, finalised and agreed with the ESPON EGTC.

ESPON Portal is built upon a software system for web-based GIS, powering mapping and visualization, analytics, and data management. It is the backbone for creating and running the interactive web-maps, data stories, dashboards and any custom GIS applications the project may propose or what ESPON may request. Hence, all proposed/requested interactive visualisations or solutions must be compatible with the system. Access to the environment can be provided by ESPON.

1.4.3 Common requirements for all deliveries

All deliveries should be delivered in electronic (editable) format and the text – whatever the format of the delivery, as relevant, should have gone through a thorough language check, preferably by an English native speaker. The ESPON EGTC will provide the generic templates for the maps; however, the service provider shall adjust the templates if necessary, depending on the geographic extent or the relevant peculiarities.

1.5 Project management

1.5.1 Mandatory meetings foreseen during the contract implementation

The service provider shall ensure participation (at least with one team representative) in all mandatory meetings mentioned below. Costs related to these meetings need to be included in the financial offer for this service. No other expenses will be paid by the contracting authority to the service provider.

Most of these meetings are held online. In the case of a physical meeting (up to 2 physical meetings shall be organised during the lifetime of the project), they will take place at the ESPON EGTC’s premises in

See: https://gis-portal.espon.eu/arcgis/apps/sites/#!/espon-hub
Luxembourg or at any other suitable locations, upon agreement between the service provider, the stakeholders and the ESPON EGTC.

**Kick-off meeting**

It will consist of a general presentation and dialogue regarding the objectives and tasks of the activity. The kick off meeting will also address more precisely the organisation of the project and the plans for the intermediary deliveries. The service provider will receive guidelines on how to use the ESPON portal interface for data delivery and digital deliveries, on how to design the maps in line with the main elements of the ESPON layout, as well as all relevant information concerning the proper application of the ESPON Corporate Identity.

**Coordination meetings**

Project coordination meetings are organised to discuss the progress on the implementation of the service contract, the deliveries submitted and to provide feedback. They take place online on a regular basis (e.g. monthly basis or more frequently if deemed necessary) by a common agreement between the service provider and the ESPON EGTC. Their agenda and duration are agreed in advance. Written minutes are prepared by the service provider to document key decision points and shared with the ESPON EGTC after each meeting.

**Steering Committee meetings**

Partnership and cooperation are central to the implementation of ESPON Targeted analysis projects and are prerequisites for ensuring useful results and meeting stakeholders’ research demands. The successful accomplishment of the objectives of this project will be achieved by proactive collaboration of the group of stakeholders, the ESPON EGTC and the service provider at every stage of the implementation.

Stakeholder involvement commenced with the definition and development of the specific theme for this targeted analysis and will continue throughout the implementation of the research and beyond. Authorities of all stakeholder institutions are determined to continuously support the work on the project, providing all necessary documents and data they possess, as well as contacts that shall be consulted. As some of the documents to be considered for this targeted analysis might be available only in the languages of the stakeholder territories, the service provider should dispose of the relevant language skills.

To allow for a framework that facilitates successful cooperation, a Steering Committee shall be established for the lifetime of this Targeted analysis. The main purpose of the Steering Committee is to ensure the involvement and active participation of stakeholders in the implementation and steering of the project and to safeguard the policy relevance of project outputs for the stakeholders.

The goals of the Steering Committee meetings are, as follows:

- To closely follow and advise the implementation of the research, making sure that it meets both, research objectives and policy demands;
- To discuss and give feedback to deliveries from the service provider and provide guidance for the subsequent steps of the research and service contract implementation;
- To facilitate the information and data flow between the service provider’s team, the stakeholders and the ESPON EGTC;
- To discuss and agree upon how to deliver - at each stage of the implementation – the results of the research to selected target groups.

Indicatively, three steering committee meetings shall be foreseen.
- The first one shall take place ca. 1 month after the kick-off meeting, preferably as a physical meeting.
- The timing and location of the other Steering Committee meetings will be discussed and agreed during the kick-off meeting and may be amended during the project implementation.

The Steering Committee shall consist of representatives of all stakeholder institutions, the service provider and the ESPON EGTC. Other stakeholders and/or relevant organisations may also take part in the Steering Committee as observers, should the contracting authority decide so (like Atlantic Regional Governments and regional experts, the chair of the Atlantic Network of Chambers of Commerce).

The Conference of Peripheral Maritime Regions - Atlantic Arc Commission is the lead stakeholder in this targeted analysis.

The other partners in the stakeholder partnership are:

- Basque Government (regional authority, Spanish Autonomous Community);
- Lisbon and Tagus Valley Regional Coordination and Development Commission (CCDR LVT) (managing authority of EU Structural Funds in the Region of Lisbon and Tagus valley);
- Atlantic Cities association (gathering 16 cities in the Atlantic coast);
- Association grouping the Economic and Social Councils of the Atlantic French, Spanish and Portuguese regions (RTA-ATN);
- CESER de l’Atlantique: association of the 4 French Atlantic Economic and Social Regional Councils: CESER Normandie, CESER Bretagne, CESER Pays de la Loire, and CESER Nouvelle Aquitaine;
- Economic and Social Regional Council of Extremadura (CES Extremadura).

1.5.2 Indicative time schedule

The table below presents the indicative time schedule for the predefined deliveries and kick-off and steering committee meetings.

The exact deadlines for the predefined deliveries as well as indicative time schedule for all other intermediary deliveries and for coordination and steering committee meetings will be agreed during the kick-off meeting.

The minutes of the kick-off meeting containing a record of the agreed dates shall be signed by the representatives of both the service provider and the ESPON EGTC and shall be subject to article 4 - “Performance of the contract and subcontracting” of the service contract.

<table>
<thead>
<tr>
<th>Meetings</th>
<th>Predefined deliveries</th>
<th>Indicative deadline&lt;sup&gt;15&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kick-off</td>
<td></td>
<td>As soon as possible (and normally within 2 weeks) after the award of the contract</td>
</tr>
<tr>
<td>Inception Delivery</td>
<td></td>
<td>T +1 month</td>
</tr>
<tr>
<td>1&lt;sup&gt;st&lt;/sup&gt; Steering Committee</td>
<td></td>
<td>T + 1 month</td>
</tr>
<tr>
<td>Progress report</td>
<td></td>
<td>T + 4 months</td>
</tr>
</tbody>
</table>

<sup>15</sup> The letter "T" in this table stands for the date of the kick-off meeting. Timeframes are indicative.
### Meetings

<table>
<thead>
<tr>
<th>Meetings</th>
<th>Predefined deliveries</th>
<th>Indicative deadline $^{15}$</th>
</tr>
</thead>
<tbody>
<tr>
<td>2$^{nd}$ Steering Committee</td>
<td></td>
<td>T + 5 months</td>
</tr>
<tr>
<td>Final Delivery</td>
<td></td>
<td>T + 10 months</td>
</tr>
<tr>
<td>Final Steering Committee</td>
<td></td>
<td>T + 11 months</td>
</tr>
</tbody>
</table>

#### 1.6 Competences and skills required

The service provider must have proven European/transnational scale research expertise and multidisciplinary experience relevant to contract matter in order to ensure the successful implementation of the service. The competence and experience of the service provider within the fields outlined below shall be clearly demonstrated and documented, as requested in Sections 3 and 4.

- Proven experience in studies addressing territorial development issues, including experience from policy-relevant and comparative analyses, preferably with a European or transnational coverage and including multi-disciplinary approaches.
- Good knowledge of territorial development challenges, policies and available data for countries in the geographical area of this targeted analysis.
- At least three of the proposed team members of the service provider shall have at least five years of experience and academic background in the field of expertise and knowledge related to this research on governance, territorial cooperation and regional development.
- Advanced GIS and web-based GIS, and data visualisation skills (QGIS, ArcGIS or equivalent) to carry out the necessary analytical work on the data resource, configure ESPON mapping templates when necessary, and present the research results in the digital format both in static and interactive manner by means of the forms agreed with the ESPON EGTC (e.g. maps, figures, webmaps, dashboards, story maps, infographics, simple video clips, apps, etc.
- Advanced data management, data quality checking, statistics, statistical programming skills (R, Python or equivalent). ESPON emphasises the importance of data quality, and highlights the complexity of data sourcing, harmonisation, data gap filling, especially when dealing with innovative, non-conventional or multitude of sources.
- At least one member with a communication/journalistic background and experience in visualising and presenting research findings in an easy-to-grasp way.
- Team members shall demonstrate a very good linguistic ability to draft and communicate research findings in high-quality English.
- Team member(s) with at least level B2$^{16}$ of written and spoken linguistic competences in the Atlantic Macro-Region States’ national languages to carry out tasks described in subsections 1.3.1, namely accessing documentation in the respective national languages, conducting surveys/interviews and engaging with stakeholders/steering committee.

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$^{15}$ Common European Framework of Reference for Languages Self-assessment tool
2 Conditions of execution of the contract

2.1 Contractual framework

By order of priority, the conditions of performance of the contract are governed by:

1. These Terms of reference with all its appendices and annexes
2. The draft model service contract
3. The contract notice
4. All responses and corrections provided during the tendering process
5. The successful tenderer’s tender with all its annexes as accepted by the ESPON EGTC

These documents constitute the complete procurement documents for this call for tenders. However, Economic operators are invited to regularly check the Luxembourg Public Procurement Portal website where any additional information or clarifications concerning this procedure will be made available. The contract shall be concluded by the signature of the contracting authority on the service contract.

By submitting a tender, tenderers accept in full all the clauses of the Terms of reference and its annexes. Under no circumstances, and under penalty of exclusion, is the tenderer permitted to modify the Terms of reference or any of its annexes. The application of the tenderers’ general or special conditions is excluded.

2.2 Duration of the contract

The contract is expected to be signed in the first semester of 2024 and shall have a duration of 14 months, 11 months for the implementation of the service contract and 3 months for the administrative closure.

The contract duration may be extended in case of modification of the contract (c.f. §2.10).

2.3 Lots

The contract consists of one single lot.

The nature of the services to be provided within the context of this tender does not justify the need to split the market.

2.4 Variants

Variants are not accepted.

2.5 Available budget

The maximum available budget for this contract is EUR 250,000.00 (two hundred fifty thousand Euros), EXCLUSIVE of VAT but inclusive of all other taxes, disbursements, travel, accommodation and delivery costs.

2.6 Main terms for invoicing and payments

Payments shall be executed only if the selected service provider has fulfilled all its contractual obligations by the date on which the invoice is submitted. Payment requests may not be made if payments for previous periods have not been executed as a result of default or negligence on the part of the service provider.

The payments to the service provider shall be made as follows:
• Three interim payments for service provisions related to the deliveries n°1, 2 and 3 shall be admissible. These interim payments shall amount to respectively a maximum of 30%, 20% and 30% of the total contracted value, excluding VAT. Interim payments shall be processed upon submission of related invoices and after formal approval of the relevant contractual obligations by the contracting authority.

• One final payment of the balance of the contract value shall be processed once all requested deliveries have been approved by the contracting authority, accompanied by the relevant invoice. The payment shall be made by bank transfer within 30 days after the approval of the deliveries and the presentation of the invoice.

Since 18 March 2023, all companies must issue electronic invoices\(^\text{17}\). Please refer to the FAQ for more information.

2.7 **Applicable Language**

Pursuant to Article 10 of ESPON EGTC' statutes, the official language of ESPON EGTC is English. Therefore, the tender, all oral and written communication, all activities during the execution of the contract, as well as all services delivered must be in English language.

2.8 **Ownership of results**

Unless otherwise provided in the present service contract and its annexes, ownership, title, industrial and intellectual property rights resulting from the operation, results, reports and other documents related to the implementation of the present service contract shall be solely owned by the ESPON EGTC. Tenderers are invited to read the full conditions in the Annex C Draft Service Contract.

2.9 **Data protection**

Regarding the processing of personal data by ESPON and in accordance with 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), please consult the legal notice in the ESPON's website:

[https://www.espon.eu/legal-notice](https://www.espon.eu/legal-notice)

2.10 **Modification of the contract during its term**

A modification of the contract may be requested by the ESPON EGTC to the contractor when it becomes necessary during the contract's implementation. This modification shall be done in accordance with article 43 of the Luxembourg Law on Public Procurement of the 8\(^{\text{th}}\) of April 2018.

\(^{17}\) [https://ec.europa.eu/digital-building-blocks/wikis/display/DIGITAL/eInvoicing+in+Luxembourg](https://ec.europa.eu/digital-building-blocks/wikis/display/DIGITAL/eInvoicing+in+Luxembourg)
3 General Information on the procedure

3.1 Communication and Portal

Written communication and submissions may only take place through the Portal under requirement of Luxembourg Law. This is the online platform for public tenders in the Grand Duchy of Luxembourg (https://pmp.b2g.etat.lu). Publication on Tenders Electronic Daily (TED) also takes place through the Portal.

As the Portal is currently available in French language only, notifications to economic operators may be sent in French, but the message content will always be in English language. Economic operators are advised to regularly check their spam folders.

Any economic operator using the Portal is deemed to have read and accepted the provisions and conditions of the terms of use of the Portal as laid down by the Ministerial Decree of 18 January 2021.18

3.2 Acceptance of the Terms of reference

By submitting a tender, the economic operator acknowledges that it has gathered all the information required to draft a valid tender, i.e., that it was able to acquaint itself with the challenges and specific features of the services to perform or deliver and has taken them into account in drafting its tender to participate in the Call for tenders.

3.3 Request for information

Tenderers are advised to consult the Frequently Asked Questions available on the ESPON website at the following link: https://www.espon.eu/participate/calls/faq

Any request for information shall be sent via the Portal at the latest by the date indicated in "Key information on the Procurement Procedure" section of the present Terms of reference. All economic operators will be answered simultaneously via the Luxembourgish Public Procurement Portal. As the Portal is currently available in French language only, notifications to the tenderers may be sent in French, but the message will always be in English language. Tenderers are advised to regularly check their spam folders.

Any request for information must be made in writing to the Luxembourgish Public Procurement Portal (www.pmp.lu) via the link provided in the contract notice.

Eventually, questions can be addressed by e-mail to: tenders@espon.eu.

Reporting of errors, omissions, ambiguities, or discrepancies

Any errors, omissions, ambiguities, or inconsistencies in the Terms of reference shall be reported to the contracting authority via the Luxembourgish Public Procurement Portal within the time limit indicated in "Key information on the Procurement Procedure" section of the present Terms of reference.

Any clarifications, rectifications or modifications provided in application of the preceding paragraph will be published exclusively via the Luxembourgish Public Procurement Portal.

In this context, a proactive approach is expected from the tenderers.

A behaviour of accepting the clauses of the Terms of reference by submitting a tender without any notification pursuant to the present clause, whilst raising subsequently possible ambiguities, inaccuracies, unlawfulness, or other irregularities of the Terms of reference in the context of a review procedure shall be considered as an inconsistent and contradictory attitude being contrary to the

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18 Règlement ministériel du 18 janvier 2021 instituant les conditions d'utilisation du portail des marchés publics. - Legilux
principle of good faith. In that event, tenderers are inadmissible to challenge the substance of the rights and obligations arising out of the Terms of reference.

3.4 **Who can submit a tender? (Individual contractor, joint tender and/or subcontracting)**

Economic operators may submit its tenders as a sole contractor, as joint partners or as a natural person acting on his/her own behalf. However, Economic operators may not participate in more than one consortium submitting Tenders. If an Economic Operator is included in more than one Tender, its personal Tender shall be excluded as per national legislation on public procurement.

Each tender shall include the duly completed European Single Procurement Document(s) (ESPD) (see Annex A).

Common **mistakes in filling in the ESPD**, as observed in previous calls, are as follows:

- To leave in blank the insured amount of professional risk indemnity (section IV.5) without specifying the amount or at least indicating “not applicable” together with the justification (i.e. excepted public entity, a certain legal provision, etc.)
- Not to indicate the proportion the economic operator intends to subcontract (section IV.10), even if the economic operator declared his intention to subcontract in a previous section of the ESPD (Section II.D)
- To indicate the same number for average annual manpower as for annual managerial staff, which is inconsistent (section IV.C.8)
- Not to sign or date the concluding statement (Part VI)
- To include the wrong procurement title

3.4.1 **Joint tender**

A **joint tender** is a situation where a tender is submitted by a group of economic operators (natural and/or legal persons). Joint tenders may include subcontractors in addition to the members of the group. Joint tenders will be treated in the same way as any other type of tender, each will be assessed for their own merits in relation to the criteria and the evaluation procedure set out in these terms of reference.

1) **Liability**

In case of a joint tender, the designated duly authorized representative of the consortium or the representative of the legal entity will be the sole contractor and will hold the sole liability towards the contracting authority for the implementation of the contract.

2) **Form of the joint tender**

If a joint tender is proposed by the tenderer with one or several partners and the organisation has already set up a consortium or a legal entity, this fact should be mentioned in the field “is the economic operator participating in the procurement procedure together with others?” (included in Part II, “information concerning the economic operator”, section A of the ESPD (Annex A), together with any other relevant information in this context.

19 Article 24 (3) Règlement grand-ducal du 8 avril 2018 portant exécution de la loi du 8 avril 2018 sur les marchés
If this step has not yet been taken, the tenderer should be aware that if the contract is awarded, the contracting authority will require giving a legal status to the collaboration before the contract is signed.

This collaboration can take the form of:

- an entity with legal personality recognised by EU Member States and ESPON Partner States (i.e. Iceland, Liechtenstein, Norway, and Switzerland);
- Or, given the nature and scope of the contract and the principle of sound financial management of public funds under which ESPON EGTC conducts its procurement procedures, the contracting authority requires **signature by all the partners of a “power of attorney”** to the designated duly authorized representative of the consortium. The power of attorney should designate contracting rights and sole liability of one of the partners in the consortium towards the contracting authority and any other relevant right. The duly authorized representative of the consortium and its partners will be responsible for organizing internal partnership relations concerning the liability among each other.

If a joint tender is submitted, the ESPD (Annex A) with all required information (i.e. duly completed Parts II, III, IV and VI) must be provided by each partner. Missing documents may lead to the exclusion and/or to the non-selection of the tender.

Also, in case of a joint tender, each economic operator must indicate its **share of the contract in the Annex D**.

Please note that in case of a joint tender where an economic operator relies on the capacities of another to meet the selection criteria: the tenderer may need to provide relevant information (included in Part II “information concerning the operator”, section C “Information about reliance on the capacities of other entities” of the ESPD).

In this respect, the tender evaluation detailed in section 4 below for joint tenders will be made in relation to the **combined** capacities of the economic operators in relation to the requirements laid down in these ToR.

### 3.4.2 Subcontracting

Subcontracting is defined as the situation where a contractor assigns part of the obligations and tasks under a contract to another party known as a subcontractor. Subcontracting can be either structural or punctual.

In case of subcontracting, the ESPON EGTC does not have a direct contractual link with the subcontractor(s). The lead contractor will remain solely and fully responsible for the delivery of all products and services under the contract.

Accordingly, the contracting authority will treat all contractual matters (e.g. payment) exclusively with the main contractor, regardless of whether the tasks are performed by a subcontractor or not. Under no circumstances, the main contractor can avoid liability towards the contracting authority on the grounds that the subcontractor is at fault.

During the contract execution, the change of any subcontractor contributing to the technical performance of the contract and identified in the tender will be subject to prior written approval of the contracting authority.

Please note that in case of a submission of a tender with subcontracting, the contracting authority requires the lead tenderer to indicate the subcontractors and their share of the contract in **Part IV: Selection Criteria, (C): Technical and professional ability, (10) The economic operator intends possibly to subcontract the following proportion (i.e., percentage) of the contract**, of the ESPD (Annex A).

As for the nature of subcontractors, there are two options:
1) Structural subcontracting

Structural subcontractors are those on whose capacity the tenderer relies (i.e., subcontractors providing key experts).

Such subcontractors should be identified in the field Part II: Information concerning the economic operator, A: Information about the economic operator, field “is the economic operator participating in the procurement procedure together with others?” of the ESPD (Annex A), together with any other relevant information in this context.

The tenderer should answer “yes” in the field “does the economic operator rely on the capacities of other entities in order to meet the selection criteria set out under Part IV below?” in Part II: Information concerning the economic operator, C: Information about reliance on the capacities of other entities of the ESPD (Annex A).

These subcontractors must provide a complete ESPD (Annex A) with all required information (i.e., duly completed Parts II, III, IV and VI).

Missing documents may lead to rejection of the tender.

2) Punctual subcontracting

Punctual subcontracting are those subcontractors on whose capacity the tenderer does not rely:

Such subcontractors should be identified in the field “Does the economic operator intent to subcontract any share of the contract to third parties?” included in Part II: Information concerning the economic operator, D: Information concerning subcontractors on whose capacity the economic operator does not rely on of the ESPD (Annex A).

These subcontractors must provide a duly completed ESPD comprising Parts II, III and VI.

Missing documents may lead to rejection of the tender.

Please note that such subcontractors will not be considered when assessing the selection criteria (see Section 4.3 below).

3) Tenders involving subcontracting shall be assessed as follows:

1. The exclusion criteria will be assessed individually in relation to the tenderer and to each subcontractor.
2. The selection criteria will be assessed in relation to the tenderer and possible subcontractors as a whole.
3. The award criteria will be assessed in relation to the tender.

3.4.3 Participation

Participation in this Call for tenders is open to all economic operators established in the European Union, the European Economic Area and third countries signatories to international agreements in the field of public procurement by which the EU is bound.

3.5 Submission of offers and deadline

All tenders must be submitted electronically and in English language at the latest by

19/02/2024 at 10h00 CET.
Tenders must be submitted electronically. All tenders sent by other means (e.g. paper versions or electronic versions submitted by e-mail) shall be automatically rejected.

In case you experience any technical issue when submitting your offer or with the electronic signature, please notice that the PMP helpdesk working hours are 9:00-11:30 14:00-17:00.

Please note that according to national legislation on public procurement\(^{20}\), only the most recently submitted tender will be taken into consideration.

The submission of a tender is made according to the provisions of the national (Luxembourg) modified Regulation of the 27th of August 2013 on the use of electronic means in public procurement procedures\(^{21}\) and it is done via the Luxembourg Portal of Public Procurement (PMP, www.pmp.lu). Please note that the PMP is currently only available in French language. A user guide in English language on the Luxembourgish Public Procurement Portal is available here: https://www.espon.eu/participate/calls/faq.

In order to submit a tender, the economic operators need to:

a) **Create an account on the Luxembourg portal of public procurements (PMP)**

The economic operators must create an Enterprise account in the PMP – www.pmp.lu

b) **Submit the electronic tender**

The tender can be submitted as PDF, Word and Excel files.

Tenders submitted electronically must also be electronically signed by the economic operator, respectively by his representative, through an electronic signature as foreseen by the modified Luxembourg Law modified of the 14th of August 2000 on electronic trade\(^{22}\).

The electronic signature to be used can be a LuxTrust or any other qualified certificates of the Trusted List of EU Commission (https://webgate.ec.europa.eu/tl-browser/#/). The Luxembourg Portal of Public Procurement allows for economic operators to test if their electronic signature is valid and can be used to submit a tender at the following address:

https://pmp.b2g.etat.lu/index.php?page=commun.VerifierSignature&callFrom=entreprise

Economic operators must electronically sign their tender:

- Either by electronically signing, at least, the ESPD of the consortium leader;
- Or by electronically signing the whole tender directly via the Luxembourg Public Procurement Portal which offers that option at the moment of submission.

If an economic operator does not have a valid electronic signature certificate, he/she will need to request one from the authorised institutions. The procedure to obtain an electronic signature certificate can take some time.

**The tenders must be submitted at the latest by the deadline indicated in the present terms of reference.**

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\(^{20}\) Article 17 of Règlement grand-ducal du 25 janvier 2019


\(^{22}\) http://data.legilux.public.lu/eli/etat/leg/loi/2000/08/14/nb80c
The electronic submission of tenders leads to an acknowledgment of receipt, issued automatically by the PMP, which states the date and hour of submission. Any tenders that may be submitted or for which the acknowledgement of receipt may be issued after the above-mentioned deadline will not be considered.

### 3.6 Content of the offer (administrative - technical offer and financial offer)

A tender **must** be duly signed by the tenderer or its duly authorised representative and **must** be composed of the following three files:

1) **Folder 1 – Administrative part**
   - Annex A ESPDs
   - Annex E List team members and economic operators
   - CVs

2) **Folder 2 – Technical Offer**
   - Technical offer
   - Annex D

3) **Folder 3 – Financial Offer**
   - Annex B Financial offer

Tenderers are requested to **structure** their tender and **submit** the requested documentation as presented in the table below which serves both as a table of content and a checklist for documents to be submitted.

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**FOLDER n°1 – ADMINISTRATIVE PART**

**Please include your documents in the following order, as relevant and per partner/subcontractor:**

<table>
<thead>
<tr>
<th>N°</th>
<th>Document</th>
<th>Refer to Section of ToR and/or Annex</th>
<th>Single tenderer or Main tenderer in a joint tender</th>
<th>Other partners in a joint tender</th>
<th>Sub-contractor (see Section 3.4.2)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| 1  | a. Annex A: European Single Procurement Document (ESPD) **two versions:**  
   - **One copy** duly electronically signed  
   - **One copy** duly filled in excel format | Section 3.4 & 
   Annex A | ☑ | ☑ | ☑ |
|    | b. Annex E - List team members and economic operators | Annex E | ☑ | n/a | n/a |
|    | c. CVs and selection criteria documents | Section 1.6 & 
   Section 4.3 | ☑ | ☑ | ☑ |

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### Terms of Reference – Orientations for the development of an Atlantic Macro-Region (AtlanticMRS)

**Annex F - Non-collusion declaration**

| Annex F |  
|----------------|----------------|
| n/a | (no template provided) |

**Only if applicable:** If you intend to employ or contract the services of previous ESPON EGTC staff for this tender, please add a note justifying how their involvement in preparing this procurement procedure is not capable of distorting competition.

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**FOLDER n°2 – TECHNICAL OFFER (approximately 30 pages excluding annexes)**

Please include your documents in the following order, as relevant:

The technical offer must cover all aspects and tasks required in the technical specifications and provide all the information needed to facilitate the subsequent evaluation of tenders against the **technical award criteria** (see Section 4). Offers deviating from the requirements or not meeting all requirements may be excluded on the basis of non-conformity with the terms of reference and will not be evaluated. The contracting authority shall reject tenders where no technical offer is included.

<table>
<thead>
<tr>
<th>Document/Chapters</th>
<th>Refer to Section of ToR and/or Annex</th>
<th>Single tenderer or Main tenderer in a joint tender</th>
<th>Other partners in a joint tender</th>
<th>Sub-contractor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>A description (approximately 5 pages) of the concept for addressing the research and the policy needs and description of how objectives will be achieved.</td>
<td>Section 1</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>
| 2 | A description (approximately 20 pages) of the specific approaches and methods to be applied, the rationale behind, the sources and data to be used and the deliveries. Tenderers shall include:  
  • Outline of the conceptual and methodological framework to be applied for each task.  
  • Description of the data strategy, including main sources and data to be used and collected.  
  • Description of the approach for engaging with stakeholders and ensuring policy uptake.  
  • Description of all proposed deliveries (format, content)  
  • Description of the main outcomes and results expected and their added value. | Section 1 | n/a | n/a |
| 3 | Description outlining the intended organisation, milestones and management of the work including: (approximately 5 pages)  
  • Detailed work plan and timetable with descriptions of the content of the deliveries proposed.  
  • Allocation of human resources by task and by partner (details should be provided as part of the technical offer and not only in Annex D). | Section 1 & Annex D | n/a | n/a |
• Approach to ensure effective project management, quality review and risk assessment.

<p>| | | | |</p>
<table>
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</thead>
<tbody>
<tr>
<td>4</td>
<td>Annex D</td>
<td>Annex D</td>
<td>✓</td>
</tr>
</tbody>
</table>

**_FOLDER n°3 – FINANCIAL OFFER**

The contracting authority will **reject** tenders where no financial offer is included.

<table>
<thead>
<tr>
<th>N°</th>
<th>Document</th>
<th>Refer to Section of ToR and/or Annex</th>
<th>Single tenderer or Main tenderer in a joint tender</th>
<th>Other partners in a joint tender</th>
<th>Sub-contractor</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Financial Offer (original dated, signed and stamped by the authorised representative of the tenderer)</td>
<td>Section 2 &amp; Annex B</td>
<td>✓</td>
<td>n/a</td>
<td>n/a</td>
</tr>
</tbody>
</table>

The tenderer shall submit a price covering the services in EURO using the financial offer template provided (see Annex B). Annex B must be signed by the tenderer’s representative and the template must not be modified.

The price must include all the costs associated as well as the travel and accommodation costs for meetings, and the pertinent delivery costs to the ESPON EGTC, if any. No other expenses will be paid by the contracting authority. **Travel, accommodation and subsistence costs cannot be higher than 10% of the total costs of the tender.**

No indexation of the price is allowed. The price quoted must be firm and not subject to revision. Tenderers from countries outside the Euro zone have to quote their prices in Euro. A price quoted may not be revised in line with exchange rate movements. It is for the tenderer to select an official exchange rate and assume the risk or the benefits deriving from any variation.

The contracting authority will reject offers where the price for services is not provided. The lack of prices for any of the assignment types mentioned in the price list will invalidate the offer. No financial guarantee is required for this contract.

Tenders not including the necessary evidence may be rejected. However, the contracting authority reserves the right to request clarifications or additional evidence in relation to the exclusion and selection stages after the opening within a time limit stipulated in its request. If clarification is required, the contracting authority may contact the tenderer to obtain further explanations and/or additional evidence, provided that, and only if, the tender is not modified as a result. **The contact person designated by the tenderer in Annex A will be the recipient of clarifications and additional evidence request. Therefore, the tenderer must ensure the correctness of contact details (in particular of email addresses) given therein.**

### 3.7 Opening of the tender

The tenders received in due time and place shall be opened by the contracting authority only after the submission deadline mentioned above.
The opening of tenders shall take place in non-public session but the minutes of the opening session will be provided to tenderers having submitted a request to the contracting authority by email at tenders@espon.eu.

4 Contract award procedure

4.1 Examination of tenders

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

- Verification of non-exclusion of tenderers on the basis of the exclusion criteria;
- Verification of tenderers documentation on the basis of selection criteria;
- Evaluation of tenders on the basis of the award criteria.

Tenders are considered not compliant with the technical specifications and shall be rejected if they:

- do not comply with the minimum requirements laid down in the Technical Specifications.
- propose a price above the fixed estimated expenditure;
- submit variants when the Terms of reference does not allow them.

In all the above-mentioned cases, the rejection grounds are not related to the award criteria and, therefore, there is no evaluation as such. Tenderers will be informed of the rejection grounds without being given information on the content of the tender other than the non-compliant elements.

Where the information or documents to be submitted by tenderers are or appear to be incomplete or erroneous or where certain documents are missing, the ESPON EGTC may carry out verifications and clarifications as provided for in article 80 RGD LMP.

4.2 Verification of non-exclusion

Participation in this call for tenders is open only to tenderers who fully meet the requirements laid out in Part III: Exclusion grounds of the ESPD (Annex A), which must be duly completed and submitted.

Tenderers are advised that, in case of contracting, supporting documents proving the statements made in the ESPD must be submitted. Please note that in line with Article 90 of the modified national (Luxembourg) Regulation of 8th April 2018 implementing the Law of 8th April 2018 on Public Procurement the following supporting documents must be dated of within three months preceding the submission deadline of the tender:

- A certificate issued by the competent authority in the Member State or country where the economic operator is established stating that it is not in breach of its obligations related to the payment of taxes and social security contributions.

Tenderers are advised, accordingly, to be in possession of properly dated documents regarding these criteria when submitting the tender.

The contracting authority may, where appropriate, ask tenderers to provide with supporting documents and may also, when having doubts concerning the personal situation of tenderers, request from the competent authorities any information it considers necessary to clarify its doubts.

Where the information concerns a tenderer established in a State other than the one of the contracting authority, the latter may seek the cooperation of the competent authorities. Having regard for the national laws of the State where the tenderers are established, such requests shall relate to legal and/or
natural persons, including, if appropriate, company directors or/and any person having powers of representation, decision, or control in respect of the tenderer.

A tenderer shall be excluded if the provisions of the article 29 of the national (Luxembourg) Law of 8 April 2018 on Public Procurement are not fulfilled.

Furthermore, tenderers should take into full consideration that:

- none of the team members proposed in the offers shall have any prior knowledge of the Terms of reference whatsoever (i.e., being involved in their commenting, consultation process with the stakeholders, drafting, etc.), have advised ESPON EGTC or otherwise been involved in the preparation of the procurement process. In such case, the tender may be excluded in accordance with article 13 of the national (Luxemburg) Law of 8 April 2018 on Public Procurement;

- not providing the declaration of no conflict of interest by the tenderer or by the service provider, before or after the award of the contract, may lead to the exclusion of the tenderer or of the service provider or to the termination of the contract;

- in case the contracting authority acquaints itself with a situation calling into question the autonomous and independent nature of a tender, it shall request the parties to provide information and evidence in rebuttal. In case distortion of the market is detected, tenderers involved shall be excluded accordingly.

4.3 Verification of the selection criteria

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

Tenderers must be in a stable financial position and have the economic and financial capacity to guarantee continuous and satisfactory performance throughout the envisaged lifetime of the contract. In addition, the tenderers are required to have sufficient technical and professional capacity to perform the tasks outlined in these Terms of reference.

To this end, the following information must be provided in the ESPD:

4.3.1 General information

Please provide the information required in “Part II: Information concerning the economic operator” of the ESPD (Annex A).

4.3.2 Economic and financial capacity

Please provide the information required in Part IV(B)(1a, 1b, 2a, 3 and 5) of the ESPD (Annex A). All related information has to be provided for the last three financial years.

The tenderer must be in a stable financial position and the total turnover of the tenderer (or the consortium, see Section 3.4) for the last three financial years (see Part IV(B)(1b) of the ESPD (Annex A)) must equal or exceed 50% of the maximum available budget for this contract as stated in these Terms of reference.

Please note that an economic operator may, when appropriate and for a specific contract, rely on the capacities of another entity not taking part in the tendering process to meet the selection criteria. (art. 33 of the Law on Public Procurement of 8 April 2018).
4.3.3 Technical and professional capacity

Tenderers must have the appropriate technical and professional ability to carry out the tasks required for this call for tenders, as described in section 1.6, by providing the required information in Part IV (C) of the ESPD (Annex A).

a) A list of the relevant services successfully conducted during at least the last three years, including a description of work, indicating the budgets, dates and recipients, whether public or private. (Part IV(C)(1b) of the ESPD)

b) the professional capacity and size of the company (Part IV(C)(8) of the ESPD)

c) The team members who are proposed to carry out the tasks requested must demonstrate professional experience and background in the field of the services requested. Relevant specific information on the competencies and skills are detailed in Section 1.
   - Please attach detailed CVs of all team members proposed for the assignment to the ESPD (Annex A), taking into account the minimum expertise requirements detailed in this paragraph as well as in Section 1. The ESPON EGTC strongly recommends submitting the CVs in the EU CV format. It should be clearly indicated by using the table in Annex E which profile requirements/competencies are met by which member of the team.
   - Please complete Annex E ‘list of all team members’ (one single list for all partners/subcontractors if relevant) involved in the implementation of the contract for whom CVs are submitted.

4.4 Financial award criterion

The value of the financial proposal (calculated in accordance with the scenario and the financial proposal supplied in Annex B) will be evaluated according to the best value for money principle.

The lack of providing a price in the financial proposal shall invalidate the offer. Tenders with a financial offer that exceeds the total budget available and/or where travel, accommodation and subsistence costs exceed 10% of the total costs shall not be selected for the evaluation on the basis of the award criteria and shall be excluded.

Calculation mistakes and discrepancies with the price per unit, if any, will be corrected by the evaluation committee based on the price per unit provided by the tenderer and the confirmation of the tenderer will be requested.

Abnormally low tenders: To avoid offers with abnormally low prices that could jeopardize the correct delivery of the services, if the price proposed in a tender appears to be abnormally low compared to the arithmetic average of all the technically compliant tenders (15%), the contracting authority will request, in writing, the necessary clarifications and elements as appropriate and in accordance with Article 88 RGD.

4.5 Evaluation of the tenders on the basis of the award criteria

Only the tenders meeting the requirements of the exclusion and selection criteria are evaluated in terms of quality and price. The assessment of the technical quality is based on the ability of the tenderer to meet the purpose of the contract, as described in the technical specifications.

The following evaluation criteria shall be used to determine the technical merit of the offers, producing a total score of maximum 100 points:

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23 For the template please see: http://europass.cedefop.europa.eu/documents/curriculum-vitae/templates-instructions

24 Règlement Grand-Ducal du 8 avril 2018 portant exécution de la loi du 8 avril 2018 sur les marchés publics et portant modification du seuil prévu à l'article 106 point 10° de la loi communale modifiée du 13 décembre 1988
### Terms of Reference – Orientations for the development of an Atlantic Macro-Region (AtlanticMRS)

<table>
<thead>
<tr>
<th>No</th>
<th>Qualitative award criteria</th>
<th>Weighting (maximum points)</th>
</tr>
</thead>
</table>
| 1  | **Level of understanding of the tasks and services to be carried out**  
The degree to which the tenderer shows the capacity to understand the research and the policy needs and the added value of the proposal, will be assessed under this criterion. | 20 |
| 2  | **Quality and appropriateness of the proposed methodology and research approach**  
The tenderer must demonstrate the capacity to answer the policy questions and to deliver the expected outputs. The degree to which the tenderer manages to combine scientific rigour and policy relevance will be assessed under this criterion. Furthermore, under this criterion the capacity of the tenderer to deliver new territorial evidence, to carry out innovative research methods, and produce outputs in various visualisation formats and forms will be assessed. | 60 |
| 3  | **Organisation, planning, and management of the service contract**  
The distribution of the roles and responsibilities for each task among the proposed team will be assessed under this criterion. The global work plan, the articulation of tasks and the allocation of time and resources to each task and delivery will also be assessed. Actual risk assessment will also be taken into account. | 20 |

**Total number of points** 100

In order to guarantee a minimum threshold of quality, offers that do not reach a minimum score of 50 points at the end of the technical evaluation will not be considered in the best price-quality ratio assessment and will therefore be rejected.

The contract is awarded to the tenderer submitting the tender that offers the most economically advantageous tender assessed on the basis of the best price-quality ratio as represented by the highest score (i.e. the highest $X$) by weighting the price and the quality respectively, by applying the formula below:

$$X = \left( \frac{\text{Cheapest price excl. VAT}}{\text{Price of tender X excl. VAT}} * 100 * 30\% \right) + (\text{technical evaluation score of tender X} * 70\%)$$

### 4.6 Contract award and conclusion

Before awarding the contract, the contracting authority will require the tenderer to which it has decided to award the contract to submit up-to-date supporting documents in accordance with the requirements of the present Terms of reference and with Article 31 of the Law on Public Procurement of 8 April 2018 and, where appropriate, Article 32. The contracting authority may invite economic operators to supplement or clarify the certificates received.

Initiation of a tendering procedure imposes no obligation on the contracting authority to award the contract. Fulfilment of the conditions of the call for tenders imposes no obligation on the contracting authority to award the contract. The contracting authority shall not be liable for any compensation with respect to tenderers whose tenders have not been accepted. Nor shall it be liable if it decides not to award the contract. Expenditure on preparing and submitting tenders is non-refundable.
The economic operator whose tender is ranked first is deemed to have submitted the most economically advantageous tender based on the best quality-price ratio is in principle awarded the contract.

Prior to any award decision, the ESPON EGTC shall carry out the necessary documentary checks as described in the Terms of reference.

The ESPON EGTC shall inform unsuccessful tenderers via the Luxembourgish Public Procurement Portal of the reasons why their tender has not been selected, in accordance with Article 193 RGD\(^25\).

The successful tenderer shall be notified via the Luxembourgish Public Procurement Portal. The conclusion of the contract with the successful tenderer shall take place at the earliest after a standstill period of 10 days.

The competent court to hear pre-contractual appeals is the Administrative Court. For post-contractual appeals, the competent court is the District Court\(^26\).

5 Additional contracting information

5.1 Contracting authority

Contracting authority: the ESPON EGTC has been established on the 9th of January 2015 based on Regulation (EC) 1082/2006 of the European Parliament and of the Council of 5 July 2006, as amended, to undertake the role of the Single Beneficiary of the ESPON 2020 Cooperation Programme, the ESPON 2030 Cooperation Programme and the potential subsequent approved ESPON cooperation programmes.

**ESPON EGTC**
Attn: Director
11, avenue John F. Kennedy L-1855 Luxembourg
Tel: +352 20 600 280 / Fax: +352 20 600 280 01 / E-mail: tenders@espon.eu
The ESPON EGTC is the contracting and awarding authority of the present contract.

5.2 Place of delivery

All services shall be delivered by default to Luxembourg, unless mentioned in Section 1 or agreed with the ESPON EGTC.

5.3 Other conditions

The material provided for the preparation of the tender can only be used for the preparation of the tender and has to be kept confidential. All the documents submitted by tenderers will be kept by the contracting authority for archive purposes. These documents will be considered as confidential.

6 Annexes

Annex A – European Single Procurement Document (ESPD)
Annex B – Financial offer template
Annex C – Draft service contract

\(^{25}\) Règlement Grand-Ducal du 8 avril 2018 portant exécution de la loi du 8 avril 2018 sur les marchés publics et portant modification du seuil prévu à l'article 106 point 10° de la loi communale modifiée du 13 décembre 1988

\(^{26}\) loi du 10 Novembre instituant le recours en matière de marchés publics
Annex D – Allocation of human resources
Annex E – List team members and economic operators
Annex F – Non-collusion declaration