



EUROPEAN CLIMATE, INFRASTRUCTURE AND  
ENVIRONMENT EXECUTIVE AGENCY (CINEA)

CINEA.D - Natural resources, climate, sustainable blue economy and clean energy  
D.2 – LIFE Environment (Nature and Circular Economy)

## **European Climate, Infrastructure and Environment Executive Agency (CINEA)**

### **Call for tenders CINEA/2026/OP/0011**

**Inter-institutional single framework contract to support  
the monitoring of LIFE projects, communication and  
other support services for the implementation of the LIFE  
programme**

**(LIFE Multiannual Work Programme 2025-2027)**

**Open procedure**

# **TENDER SPECIFICATIONS**

## TABLE OF CONTENTS

1.	Scope and description of the procurement .....	4
1.1.	Contracting Authority: who is the buyer? .....	4
1.2.	Subject: what is this call for tenders about? .....	5
1.3.	Lots: is this call for tenders divided into lots? .....	5
1.4.	Description: what do we want to buy through this call for tenders?.....	5
1.4.1.	Background and objectives .....	5
1.4.2.	Detailed characteristics of the purchase .....	20
1.4.2.1.	Horizontal aspects to consider.....	20
1.4.2.2.	Services requested .....	21
1.4.2.3.	Other requirements for the performance of the service.....	110
1.4.3.	Performance and quality requirements.....	112
1.4.4.	Deliverables.....	114
1.4.5.	Contractor's trainings and meetings: responsibilities and coverage of expenses.....	116
1.4.6.	Content, structure and graphic requirements of publishable deliverables.....	117
1.5.	Place of performance: where will the contract be performed?.....	119
1.6.	Nature of the contract: how will the contract be implemented? .....	119
1.7.	Volume and value of the contract: how much do we plan to buy? .....	120
1.8.	Duration of the contract: how long do we plan to use the contract?.....	121
1.9.	Electronic exchange system: can exchanges under the contract be automated?.....	121
1.10.	Security.....	121
1.11.	Other provisions .....	121
1.11.1.	Fraud prevention and detection .....	121
1.11.2.	Environmental considerations .....	122
1.11.3.	Equal opportunities .....	122
2.	General information on tendering .....	123
2.1.	Legal basis: what are the rules?.....	123
2.2.	Entities subject to restrictive measures and rules on access to procurement: who may submit a tender?.....	123
2.3.	Registration in the Participant Register: why register?.....	124
2.4.	Ways to submit a tender: how can economic operators organise themselves to submit a tender? .....	125
2.4.1.	Joint tenders.....	126
2.4.2.	Subcontracting.....	127

2.4.3. Entities (not subcontractors) on whose capacities the tenderer relies to fulfil the selection criteria.....	129
2.4.4. Rules common to subcontractors and entities (not subcontractors) on whose capacities the tenderer relies to fulfil the selection criteria..	129
3. Evaluation and award .....	130
3.1. Exclusion criteria.....	130
3.2. Selection criteria.....	132
3.2.1. Legal and regulatory capacity .....	132
3.2.2. Economic and financial capacity.....	133
3.2.3. Technical and professional capacity.....	133
3.3. Compliance with the conditions for participation and minimum requirements specified in the procurement documents .....	147
3.4. Award criteria.....	148
3.5. Award (ranking of tenders) .....	151
4. Form and content of the tender .....	152
4.1. Form of the tender: how to submit the tender? .....	152
4.2. Content of the tender: what documents to submit with the tender? .....	152
4.3. Signature policy: how can documents be signed?.....	153
4.4. Confidentiality of tenders: what information and under what conditions can be disclosed? .....	154
5. Functioning of the framework contract.....	156
Appendix: List of references .....	158
Annexes .....	159

## 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](#))<sup>1</sup>, referred to as the Contracting Authority for the purposes of this call for tenders, acting under the powers delegated by the European Commission.

This call for tenders is interinstitutional. The following EU institutions, agencies and bodies (hereafter the *participating entities*) will participate as contracting authorities to the framework contract resulting from this call for tenders:

Participating entities	
<b>CINEA</b>	European Climate, Infrastructure and Environment Executive Agency
<b>DG ENV</b>	European Commission represented by the Directorate-General for Environment

The list of *participating entities* may be extended to include any other institution, agency or body created on the basis of the [Treaties](#) or secondary Union law after the launch of this procedure.

The lead Contracting Authority is the European Climate, Infrastructure and Environment Executive Agency (CINEA). CINEA, acting as an agent for the *participating entities* for the purposes of this call for tenders and the resulting framework contract, publishes the call for tenders, organises the evaluation, signs and manages the framework contract (including any amendments thereto) on behalf of all *participating entities*.

Each of the *participating entities* may avail itself of the resulting framework contract autonomously by concluding specific contracts<sup>2</sup> with the contractor.

The contractor must ensure the smooth implementation of all tasks with each concerned Contracting Authority.

References to the Contracting Authority in these tender specifications and their annexes shall be understood, depending on the context, as referring to one of the following:

– the European Climate, Infrastructure and Environment Executive Agency (CINEA), acting in its capacity as lead Contracting Authority;

---

<sup>1</sup> 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).

<sup>2</sup> Including order forms as a simplified form of specific contract in case of supplies or supplies and services contracts.

- all the participating entities, in relation to their collective rights and obligations with the contractor, as one of the parties to the framework contract;
- any of the *participating entities*, acting in its own capacity, in particular for matters related to the conclusion, execution or termination of specific contracts with the contractor.

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

The subject of this call for tenders is an “Inter-institutional single framework contract to support the monitoring of LIFE projects, communication and other support services for the implementation of the LIFE programme”.

## **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 purchases that are the subject of this call for tenders, including any minimum requirements, are described in detail below.

Tenderers are invited to get acquainted with the foundational documents of the three successive LIFE programmes, namely:

- the [LIFE Regulation \(EC\) No 614/2007](#) of the European Parliament and of the Council of 23 May 2007 concerning the Financial Instrument for the Environment (LIFE+),
- the [LIFE Regulation \(EU\) n°1293/2013](#) of the European Parliament and of the Council of 11 December 2013 (LIFE 2014-2020).
- the [LIFE Regulation \(EU\) 2021/783 of the European Parliament and of the Council of 29 April 2021](#) (LIFE 2021-2027), the [LIFE monitoring and evaluation framework](#), [LIFE Multiannual Work Programme 2021-2024](#), the [LIFE priority topics 2021-2024](#), the [LIFE Multiannual Work Programme 2025-2027](#) and the [LIFE priority topics 2025-2027](#).

These documents will provide a clear framework and description of the areas of activities. The following section of the tender specifications provides an overview of the main elements subject to this procurement procedure. The detailed description of the different types of activities financed under the LIFE programme is set out in the LIFE Multiannual Work Programmes referred to above.

Most of the activities under the LIFE programme are implemented directly by the Commission services or by CINEA. CINEA acts within the limits of the delegation defined by the Commission and under its supervision. The overall responsibility for the programme remains with the Commission.

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 aim of this procurement is to select one contractor in view of supporting the LIFE programme management by providing:

- a. assistance for the monitoring of ongoing projects (action grants) and operating grants funded from previous and on-going LIFE programmes.
- b. thematic support<sup>3</sup> in the fields of resource efficiency, including circular economy, bioeconomy, zero pollution and quality of the environment (i.e., water , air and noise, soil and chemicals management), nature and biodiversity, climate change governance and information, climate change mitigation, climate change adaptation and resilience, energy and close-to-market<sup>4</sup> activities.
- c. assistance and technical support for the communication activities of the LIFE programme across all its fields of intervention, taking into account their respective specificities, in view of highlighting programme and grants results and promoting the LIFE funding opportunities.

The specific objectives linked to the general objectives (a) and (b) above are:

- Providing a high quality, timely and reliable technical and financial monitoring of projects and operating grants.
- Providing high quality, timely and reliable thematic support in the following fields: resource efficiency, including circular economy, bioeconomy, zero pollution and quality of the environment (i.e., water , air and noise, soil and chemicals management), nature and biodiversity, climate change governance and information, climate change mitigation, climate change adaptation and resilience, energy and close-to-market activities.

The specific objectives linked to the general objective (c) above are:

- Providing a high quality, timely and reliable delivery of all requested communication services.
- Highlighting programme and grants results and promoting the LIFE funding opportunities, across all its fields of intervention, taking into account their respective specificities.

The contractor may have to reply to specific requests from different contracting authorities.
-----------------------------------------------------------------------------------------------

## **Background:**

---

<sup>3</sup> Thematic support includes project mapping, preparation of policy briefs and platform events gathering projects in the same theme to provide policy feedback, evaluation of project and programme results, etc. Further details are provided in the description of Services 1 and 3 under section 1.4.2.2 Services requested.

<sup>4</sup> Further info on LIFE close-to-market activities is available in [https://cinea.ec.europa.eu/programmes/life/life-close-market-projects\\_en](https://cinea.ec.europa.eu/programmes/life/life-close-market-projects_en)

### **1.4.1.1. The LIFE Programmes**

#### **1.4.1.1.1. The “legacy” programmes: LIFE+ and LIFE 2014-2020**

The fourth phase of the LIFE programme, LIFE+ ran from 2007-2013 and had a budget of EUR 2.143 billion. It consisted of three components: LIFE+ Nature and Biodiversity, LIFE+ Environment Policy and Governance, and LIFE+ Information and Communication. The legal basis is [Regulation \(EC\) No 614/2007 of the European Parliament and of the Council of 23 May 2007](#) concerning the Financial Instrument for the Environment (LIFE+).

The general objective of LIFE+ was to contribute to the implementation, updating and development of Community environmental policy and legislation, including the integration of the environment into other policies, thereby contributing to sustainable development. In particular, LIFE+ intended to support the implementation of the Sixth Community Environment Action Programme (6<sup>th</sup> [EAP](#)), including the thematic strategies, and finance measures and projects with European added value in Member States.

LIFE+ Nature & Biodiversity co-financed best practice or demonstration projects that contributed to the implementation of the Birds and Habitats directives and the Natura 2000 network. It also co-financed innovative or demonstration projects contributing to the implementation of the objectives of [Commission Communication \(COM \(2006\) 216 final\)](#) on "Halting the loss of biodiversity by 2010 – and beyond". At least 50% of the LIFE+ budget for project co-financing had to be dedicated to LIFE+ Nature and Biodiversity projects.

LIFE+ Environment Policy & Governance co-financed innovative or pilot projects contributing to the implementation of European environmental policy and the development of innovative policy ideas, technologies, methods and instruments. It also helped monitor pressures (including the long-term monitoring of forests and environmental interactions) on our environment.

LIFE+ Information & Communication co-financed projects relating to communication and awareness-raising campaigns on environmental, nature protection or biodiversity conservation issues, as well as projects related to forest fire prevention (awareness raising, special training).

The fifth phase of the LIFE programme covered the period from 1 January 2014 to 31 December 2020. It established the Environment and Climate Action sub-programmes. The legal basis for LIFE is Regulation (EU) n°1293/2013 of the [European Parliament and of the Council of 11 December 2013](#).

The general objectives of the LIFE 2014-2020 programme were:

- to contribute to the shift towards a resource-efficient, low-carbon and climate- resilient economy, to the protection and improvement of the quality of the environment and to halting and reversing biodiversity loss, including the support of Natura 2000 network and tackling the degradation of ecosystems;
- to improve the development, implementation and enforcement of Union environmental and climate policy and legislation, and to act as a catalyst for, and promote, the integration and mainstreaming of environmental and climate objectives into other EU policies and public and private sector practice, including by increasing the public and private sector's capacity;
- to support better environmental and climate governance at all levels, including better involvement of civil society, non-governmental organizations (NGOs) and local actors;

- to support the implementation of the [7th Environment Action Programme \(7th EAP\)](#).

In pursuing those objectives, the LIFE Programme contributed to sustainable development and to the achievement of the objectives and targets of the [Europe 2020 Strategy](#) and of relevant EU environment and climate strategies and plans. The general objectives of the LIFE programme were pursued through the following two sub-programmes:

- the sub-programme for Environment.
- the sub-programme for Climate Action.

#### **1.4.1.1.2. The LIFE programme 2021-2027**

Covering the period from 1 January 2021 to 31 December 2027, the [LIFE programme 2021-2027](#) was established by [Regulation \(EU\) 2021/783 of the European Parliament and of the Council](#) establishing a Programme for the Environment and Climate Action (LIFE) and repealing Regulation (EC) No 1293/2013 (the "LIFE Regulation").

LIFE is the EU's funding instrument for nature, biodiversity protection and climate mitigation and adaptation. From 2021, LIFE also funds actions related to energy efficiency and renewable energy. For the duration of the [Multiannual Work Programme 2021-2024 \(MAWP 2021-24\)](#), the overall indicative budget devoted to grants was EUR 2.357 billion. The MAWPs provide a detailed view of the activities to be implemented under the LIFE programme for the years 2021-2024 and 2025-2027. The current [Multiannual Work Programme 2025-2027 \(MAWP 2025-27\)](#) has an overall indicative budget devoted to grants of EUR 1.879 billion.

Article 3 (1) of LIFE Regulation states that ‘The general objective of the LIFE Programme shall be to contribute to the shift towards a sustainable, circular, energy-efficient, renewable energy-based, climate-neutral and resilient economy, in order to protect, restore and improve the quality of the environment, including the air, water and soil, and to halt and reverse biodiversity loss and to tackle the degradation of ecosystems, including by supporting the implementation and management of the Natura 2000 network, thereby contributing to sustainable development. The LIFE Programme shall also support the implementation of general action programmes adopted in accordance with Article 192(3) TFEU’.

In this regard, the LIFE programme as a whole contributes fully to the objectives and targets of the [European Green Deal](#), which aims to:

- transform the EU into a fair and prosperous society, with a modern, resource-efficient and competitive economy where there are no net emissions of greenhouse gases in 2050 and where economic growth is decoupled from resource use;
- protect, conserve and enhance the EU's natural capital, and protect the health and wellbeing of citizens from environment and climate related risks and impacts.

The LIFE Programme contributes to these European Green Deal priorities through its four sub-programmes in particular by:

- boosting and integrating the implementation of the EU’s policy objectives for halting and reversing loss of wildlife habitats and species across all sectors, as well as the Biodiversity Strategy objectives for 2030;
- supporting the transition to a circular economy and protecting and improving the quality of EU’s natural resources, including air, soil and water among others;

- supporting implementation of the 2030 energy and climate policy framework, the EU's climate neutrality objective by 2050, and the EU strategy on adaptation to climate change;
- building capacity, stimulating investments and supporting implementation of policies focused on energy efficiency and small-scale renewables.

In addition, through the above the LIFE programme contributes as well substantially to the three pillars of the [Competitiveness Compass for the EU](#), which aims to:

1. Close the innovation gap
2. Decarbonise the EU economy
3. Reduce external dependencies

Some specificities in the objectives of the current LIFE Regulation to be highlighted are:

- Strengthened action on nature and biodiversity with an extended scope and a dedicated support to coordinated programmes of action in the Member States. This will contribute to the biodiversity ambition of providing 10 % in 2026 and in 2027 of annual spending under the multiannual financial framework to biodiversity objectives.
- A 61% target for expenditures supporting climate objectives in line with the ambition of reaching climate neutrality by 2050.
- Strengthened action on energy efficiency and renewable energies.
- An extended opportunity for synergies with other funds and programmes, in particular through the Seal of Excellence and cumulative funding.
- An increased impact to meet societal challenges by combining efforts with Horizon Europe, in particular its Missions in support of the European Green Deal (Climate adaptation, Climate neutral cities, Oceans and Soils).
- An expanded geographical scope involving Overseas Countries and Territories (OCTs) and the third countries associated to the LIFE Programme.

According to Article 4 of the LIFE Regulation, the LIFE programme is structured into two fields – (1) Environment and (2) Climate Action – and **four sub-programmes**:

- (1a) Sub-programme «**Nature and Biodiversity**» (NAT/BIO)
- (1b) Sub-programme «**Circular Economy and Quality of Life**» (CEQL)
- (2a) Sub-programme «**Climate Mitigation and Adaptation**»
- (2b) Sub-programme «**Clean Energy Transition**» (CET)

#### **1.4.1.1.3. Support provided by the LIFE programmes through grants**

The programme is supporting the following **two types of LIFE grants**:

- A) LIFE action grants,
- B) LIFE operating grants.

##### **A) LIFE action grants**

Calls for action grants are open to any legal entity subject to public or private law that is legally registered in one of the eligible countries. Proposals can either be submitted by single beneficiaries or by a partnership, which includes one coordinator and one or several other beneficiaries. They can be either national or transnational, and the actions must primarily take place within the territory of the 27 EU Member States, including overseas countries and territories (OCTs), and in the countries associated to the LIFE Programme ([participating countries](#)).

Since 2021, proposals are submitted to CINEA in the framework of calls for proposals that are usually launched annually. Detailed information on thematic priorities of each of the sub-programmes and specific calls for proposals, such as [project topics](#) and project types can be found on the [LIFE programme website](#). These documents can be used as reference and complementary information, although they may be updated for the next calls.

***For the legacy programmes (before 2021)***

The table below summarises the main information on action grants:

Environment sub-programme	Climate Action sub-programme
<p><b>Priority areas</b></p> <ul style="list-style-type: none"> <li>• Nature and Biodiversity (NAT/BIO)</li> <li>• Environment and Resource Efficiency (ENV-RE)<sup>15</sup></li> <li>• Environmental Governance and Information (GIE)<sup>16</sup></li> </ul>	<p><b>Policy areas</b></p> <ul style="list-style-type: none"> <li>• Climate Change Mitigation (CCM)</li> <li>• Climate Change Adaptation (CCA)</li> <li>• Climate Governance &amp; Information (GIC)</li> </ul>
<p style="text-align: center;"><b>Types of projects</b></p> <ul style="list-style-type: none"> <li>• <b>traditional projects:</b> pilot projects, demonstration projects and best practice projects as well as Governance and Information (TPs);</li> <li>• <b>integrated projects (IPs);</b></li> </ul> <p>For the following three types there will be no ongoing grant during the implementation of the framework contract:</p> <ul style="list-style-type: none"> <li>• <b>technical assistance projects (TAs)</b></li> <li>• <b>capacity-building projects (CAPs);</b></li> <li>• <b>preparatory projects (PREs);</b></li> <li>• any other projects needed for the purpose of achieving the general objectives set out in Article 3 of the previous LIFE Regulation (EU) n°1293/2013.</li> </ul>	

The overall **budgetary envelope** for the LIFE programme for the period 2014-2020 was EUR 3.457 billion, 75% of which were attributed to the sub-programme Environment, and 25% of which were attributed to the sub-programme Climate Action.

***For the LIFE Programme 2021-2027***

Action grants may finance the following **types of actions**, in line with Article 11 of the LIFE Regulation:

- a. Standard Action Projects (SAPs) under the sub-programmes Nature and Biodiversity, Circular Economy and Quality of Life, and Climate Change Mitigation and Adaptation

These projects represent the traditional LIFE projects and are aimed to:

- Develop, demonstrate and promote innovative techniques, methods and approaches;
- Contribute to the knowledge base and to the application of best practices;
- Support the development, implementation, monitoring and enforcement of the relevant union legislation and policy, including by improving governance at all levels, in particular through enhancing capacities of public and private actors and the involvement of civil society;
- Catalyse the large-scale deployment of successful technical and policy related solutions for implementing the relevant union legislation and policy by replicating results, integrating related objectives into other policies and into public and private sector practices, mobilising investment and improving access to finance.

b. Strategic Nature Projects (SNaPs) under the sub-programme Nature and Biodiversity

These projects aim to support the achievement of Union nature and biodiversity objectives by implementing coherent programmes of action in the Member States<sup>5</sup> in order to mainstream these objectives and priorities into other policies and financing instruments, including through coordinated implementation of the Prioritised Action Frameworks (PAF) established pursuant to Directive 92/43/EEC.

c. Strategic Integrated Projects (SIPs) under the sub-programmes Circular Economy and Quality of Life, and Climate Change Mitigation and Adaptation

These projects support the implementation on a regional, multi-regional, national or transnational scale, of environmental or climate strategies or action plans developed by Member States' authorities and required by specific environmental, climate or relevant energy Union legislation or policy of the Union, while ensuring that stakeholders are involved and promoting coordination with and mobilisation of at least one other Union, national or private funding source.

The SNaPs and the SIPs are the two categories of the so-called Strategic Projects (STRAT).

d. Technical Assistance (TA) projects under all LIFE sub-programmes

These projects may support the development of capacity for the following activities:

- Participation in standard action projects and preparation of SNaPs and SIPs (TA-PP);
- Preparation for facilitating the up-scaling and replication of results from other projects funded by the LIFE Programme, its predecessor programmes or other Union programmes and for accessing other Union financial instruments (TA-R);
- The capacity building of Member States Authorities with low effective participation in the LIFE programme with a view to improving the LIFE National Contact Points<sup>6</sup> services across the EU and to increasing the overall quality of proposals submitted (TA-CAP).

---

<sup>5</sup> EU Member States, including overseas countries and territories (OCTs), and countries associated to the LIFE Programme ([participating countries](#)). The same geographical scope applies to the rest of grants for the LIFE Programme 2021-2027.

<sup>6</sup> The LIFE National Contact Points help applicants with their applications and may organise information and networking events and proposal writing workshops. They can also support in communicating and disseminating grants' results. Their list is available on the LIFE website at [https://cinea.ec.europa.eu/life/life-european-countries\\_en](https://cinea.ec.europa.eu/life/life-european-countries_en)

e. Other Actions (OA) needed for the purpose of achieving the general objective set out in Article 3(1) of the LIFE Regulation.

In line with point (e) of Article 11 (2) of the LIFE Regulation, “Other Actions” will include inter alia, Coordination and Support Actions (CSA) for the transition to renewable energy and increased energy efficiency aiming at breaking market barriers that hamper the socio-economic transition to renewable energy and increased energy efficiency, including capacity building, dissemination of information and knowledge, and awareness raising; a Small Grant Facility on Biodiversity (BEST) and projects responding to specific Union legislative and policy priorities, determined on annual basis, following a consultation with Member States and third countries associated to the LIFE Programme (LIFE PLP).

The overall **budgetary envelope** for the LIFE programme for the period 2021-2027 is EUR 5.432 billion with the following repartition:

- Sub-programme Nature and Biodiversity: EUR 2.143 billion
- Sub-programme Circular Economy and Quality of Life: EUR 1.345 billion
- Sub-programme Climate Mitigation and Adaptation: EUR 0.947 billion
- Sub-programme Clean Energy Transition: EUR 0.997 billion

The calls for proposals for action grants supported by the current LIFE programme have been launched annually, since 2021. The monitoring of the implementation of the related action grants start once the grant agreements have been signed with the successful applicants (i.e. beneficiaries). The signature of the grant agreements is expected to take place every year at the latest in autumn.

## **B) LIFE operating grants (OGs)**

Unlike action grants, LIFE operating grants are intended to provide financial support for the existence and functioning of an organisation over a period equivalent to its financial year. They cover the normal operating expenses, which enable the organisation to have an independent existence and implement its annual work programme, which is the basis for the selection.

Calls for operating grants are only open to:

1. Non-profit making entities that are primarily active in protecting and enhancing the environment at European level and that are involved in the development and implementation of EU environmental, climate and sustainable energy policy and legislation. Applicants must be non-profit making entities and independent non-governmental organisations (NGOs) legally registered in the European Union. Applicants must furthermore be active at European level, i.e. have activities and members in at least three EU Member States.

The indicative number of operating grants per year is expected to range from 30 to 35, for a yearly budget ranging from EUR 15 to 17 million.

Further relevant information, including lists of beneficiaries in previous years, is to be found on a dedicated [webpage](#). The documents published together with the latest calls for proposals are accessible on the [Funding and Tenders Portal](#). These documents can be used as reference and complementary information, although they may be updated for the next call.

2. The networks listed in Annex I of the LIFE Regulation (Bodies to which grants may be awarded without a call for proposals).

#### 1.4.1.1.4. Overview of grant types and numbers

During the implementation of this framework contract (indicatively from second quarter of 2027 to second quarter of 2031 if the contract is renewed in 2029), the indicative total number of ongoing grants supported by the LIFE programmes is estimated to be in the range of 761 to 1,266, including LIFE CET grants. The number of ongoing grants that may use the bulk of monitoring tasks (all grants but LIFE CET ones) as described in section 1.4.2.2.2 are on average around 825. The table below provides an indicative number of grants per programme and subprogrammes.

It is expected that the LIFE projects supported under the LIFE CET subprogramme will not be monitored but may benefit from some other tasks described in section 1.4.2.2.

#### Indicative number of open LIFE grants over the coming years<sup>7</sup>

Programme/Subprogramme/grant types	2027	2028	2029	2030	2031
<b>LIFE+ and LIFE 2014-2020</b>					
ENV-RE – traditional projects	35	15	4	2	0
NAT/BIO – traditional projects	112	55	14	3	1
GIE – traditional project	10	2	0	0	0
CLIMA (CCA, CCM & GIC) – traditional projects	36	12	4	0	0
ENV – Integrated projects	18	16	9	5	2
NAT – Integrated projects	21	14	10	7	4
CLIMA – Integrated projects	13	11	8	6	4
<i>Subtotal</i>	<i>245</i>	<i>125</i>	<i>49</i>	<i>23</i>	<i>11</i>
<b>LIFE 2021-2027</b>					
Circular economy and quality of life - Standard action projects	204	218	206	173	142
Nature & Biodiversity - Standard action projects	217	266	273	244	206

<sup>7</sup> The number of projects includes the newly selected projects and the ongoing ones not yet closed in a given year.

Programme/Subprogramme/grant types	2027	2028	2029	2030	2031
Circular economy and quality of life – Strategic Integrated Projects	15	22	28	29	29
Nature & Biodiversity - Strategic Nature projects	12	19	25	26	26
Climate action – Standard action projects	144	164	155	126	101
Climate action – Strategic projects	15	20	24	25	25
Other grants (NGO OGs, TA-PP, PLP and TA-R)	124	97	90	88	82
<i>Subtotal</i>	<i>731</i>	<i>804</i>	<i>802</i>	<i>710</i>	<i>611</i>
Total of all projects excluding Clean Energy transition <sup>8</sup>	976	929	851	733	622
Clean Energy Transition (LIFE 2021-2027)	290	298	263	198	139
<b>Grand Total</b>	<b>1266</b>	<b>1227</b>	<b>1114</b>	<b>931</b>	<b>761</b>

The current repartition of ongoing grants per EU Member State (country of the coordinating beneficiaries) is provided in Annex 7– Relevant information for tenderers.

The following table provides some characteristics of the grants that were financed under the **LIFE + and LIFE 2014-2020 Programmes**.

Grant type and priority areas	Average total costs in MEUR	Average contribution MEUR	EU in	Average duration in months	Average number of beneficiaries
Traditional projects					
ENV-RE	2.99	1.42		52	5.3
NAT/BIO	4.67	2.83		69	6.9

<sup>8</sup> Those projects are subject to the technical and financial monitoring tasks described under the section 1.4.2.2.2.

GIE	1.92	1.10	48	7.1
CCM	3.37	1.63	52	5.9
CCA	3.05	1.59	59	6.9
GIC	1.92	1.06	47	6.2
CAP	0.83	0.70	50	1
Integrated Projects (IP)				
Environment (IPE)	18.55	10.83	98	15.8
Climate Action (IPC)	17.39	9.01	93	13.1
Preparatory Projects (PRE)	1.37	0.80	37	1

The following table provides similar characteristics of the grants that are being financed under the LIFE 2021-2027 Programme (excluding the LIFE CET subprogramme).

Grant type and priority areas	Average total costs in MEUR	Average EU contribution in MEUR	Average duration in months	Average number of beneficiaries
Standard action projects				
CLIMA	4.1	2.4	52	7
CEQL	4.9	2.4	47	6
NAT/BIO	7.8	5.2	71	9
Strategic Projects (SP)				
Climate Action (SIP-C)	20.5	12.1	96	38
CEQL (SIP-E)	26.0	15.6	109	25
Nature (SNaP)	42.1	25.3	112	14
Other grants (NGO OGs, TA-PP, TA-PLP and TA-R)	1.7	0.6	30	2

The following table provides similar characteristics of the grants that are being financed under the LIFE CET subprogramme within the LIFE 2021-2027 Programme:

Grant type and priority areas	Average total costs in MEUR	Average EU contribution in MEUR	Average duration in months	Average number of beneficiaries
CET (Coordination and Support Action Grants (CSA))	1.7	1.6	36	9

#### **1.4.1.2. IT tools**

A series of IT tools are used by the various actors of the LIFE communities such as:

- applicants to a call for proposals and LIFE beneficiaries
- Contracting Authority's staff
- external monitoring team of the contractor
- external communication team of the contractor

Access to these applications will be granted on an individual basis to the contractor's staff (see linked conditions listed in section 1.10 Security). At the start of the implementation of the first specific contract under this framework contract, the Contracting Authority will provide training on the use of these tools. Should new tools be introduced or further developments made to existing tools, the Contracting Authority will provide any necessary additional training to the contractor's staff. A representative of the contractor may also be invited as an observer in the LIFE IT project steering committee responsible for decisions on the evolution of the IT tools. The current systems are described below. The contractor shall fully adopt any new systems developed by the Contracting authority during the implementation of the framework contract.

##### **1.4.1.2.1. eProposal (used by monitoring team)**

eProposal is a web-based application that was used between 2012 and 2020 to allow electronic submission of proposals in response to calls for proposals for traditional projects<sup>9</sup>. Since 2021, eProposal is not used anymore to submit proposals, and is replaced by the Funding and Tenders Portal IT suite. However, all applicants who submitted their proposals via eProposal may still access it and need to use it to submit amendments.

The eProposal application includes a range of features including the creation and submission of a project proposal by an applicant, communication between applicants and the Contracting Authority during the phase of grant agreement preparation, up to the signature of the grant agreement.

During the application phase, applicants were required to complete a series of forms in eProposal providing administrative information, describing the action and presenting the estimated budget.

For the beneficiaries that submitted their application in eProposal, in case they wish to request amendments to the Grant Agreement, they will be granted access again to their project data<sup>10</sup>.

<sup>9</sup> Please note that Integrated Projects and Capacity Building projects were not submitted in eProposal.

<sup>10</sup> In eProposal, project data can be modified only by the Coordinating beneficiary that has the edit right. Nor the Contracting Authority nor the contractors' team have edit rights.

Prior to the final assessment by the Contracting Authority, the external monitoring team will carry out a quality check to verify the correctness of the modifications introduced by the beneficiaries.

See linked task 2.1 under Section 1.4.2.2. Service requested.

#### **1.4.1.2.2. Funding & Tenders Portal (F&T)**

The [Funding & Tenders Portal](#) is the entry point for a series of web-based applications that are used by the European Commission and its Executive Agencies to manage the entire lifecycle of grants benefiting from EU grants through a series of IT tools. The LIFE 2021-2027 Programme is now using those IT tools.

External users have access to specific applications and tools that allow them to perform actions such as searching for funding opportunities, accessing calls documentations and partners, submitting their proposals. When their proposals are selected for funding, applicants use the system for the grant agreement preparation and signature.

During grant implementation, grant beneficiaries from Calls LIFE 2021 - onwards use the F&T tools to upload their reports and deliverables, payment and amendment requests.

When requested by the Contracting Authority (via Butler (see below) or via another mean), the external monitoring experts will retrieve the necessary grant data from the F&T portal to perform the tasks 1.3, 2.1, 2.2, 2.3, 2.4, 3.1, 3.2, 3.3, 3.5, 4.2, 4.3, 4.4 and 4.5, as described under Section 1.4.2.2. Service requested.

The communication team may be requested as well to use information from the F&T portal for communication activities.

In the F&T Portal, the external monitoring team has read-only access to the grants assigned to them. The number of experts assigned to grants is limited to maximum four experts per grant.

Currently it is not expected that the contractor's team acts in the F&T. If this would be modified, the workflows currently in Butler would be mirrored in the F&T and the contractor will be informed accordingly.

#### **1.4.1.2.3. Butler (used by monitoring and communication teams)**

Butler is a web-based application that is used for the grant management of all the grants funded under the LIFE programmes after the signature of the grant agreement. The Contracting Authority is using Butler for the administrative, technical and financial follow up of the grants, including assessing amendments, deliverables and payment requests.

Butler is also accessible to the external monitoring and communication teams.

For LIFE+ and LIFE 2014-2020 funded grants, Butler is used as a repository of the grant agreement, amendments, communications, grants deliverables, reports and supporting documents uploaded by the Contracting Authority, the external monitoring team as well as the beneficiaries; for the LIFE 2021-2027 grants the Funding and Tenders Portal is used for reporting and repository purposes.

For all grants, Butler is the main interface between the Contracting Authority staff and external monitoring team for the follow up of the administrative, technical and financial deliverables of the grants, including technical amendments, budgetary amendments, payment requests etc. Butler will be used to assign specific monitoring tasks to the experts from the external monitoring team.

When tasks are assigned, the experts will perform them and upload their monitoring assessment reports and outputs. Those will then be available for Contracting Authority's staff for action and decision; however, they will not be available to the grants beneficiaries. During their task assignment, the external monitoring team may be requested to update the grants' data included in Butler when relevant, following an amendment.

In Butler, each task is linked to workflows with fixed deadlines to respect for each of the involved actors. Deadlines applying to the external monitoring team are described under the tasks' description.

In Butler, each external expert has access only to the grants to which (s)he is assigned to. A limited number of experts may have access to all grants e.g., in order to be able to track the performance of the external experts.

The external Communication team will use the Butler dissemination module to upload information on grants themes, keywords, objectives, publications, etc., for dissemination through the [LIFE Public Database](#). The information is updated, verified, and published using a workflow embedded in Butler. The synchronisation with the LIFE Public Database is done automatically.

See task 4.2.2 under Section 1.4.2.2. Service requested.

#### **1.4.1.2.4. LIFE Project Indicators Database (used by monitoring team)**

The LIFE funded projects are monitored and assessed based on LIFE Project Indicators (LPIs). For this purpose, LIFE projects beneficiaries are obliged to report on their LPIs via a web-based tool managed by the Contracting Authority. The beneficiaries must report their initial and final LPIs at specific intervals specified in the grant agreement. In addition to reporting at the projects' start and end, LIFE integrated and strategic projects are also obliged to report via the webtool in the middle of their lifetime (at interim stage). A limited number of projects (around 20 per year) may be requested to update their LPIs in the webtool after their project end (ex-post update).

The project data in the LPI webtool allow the assessment of the performance of the whole LIFE programme. This information is used to enable compliance of the LIFE programme with legal obligations, including an annual "Programme Performance Statement", as well as to assess its impact on other occasions.

Detailed information on the indicators and the LPI webtool is available in the [LIFE LPI section of the LIFE website](#) (see in particular [this LPI guidance document](#)).

The external monitoring team will provide any necessary clarification to the LIFE grant beneficiaries concerning reporting the impact of their project in all the above stages (first, interim (where relevant), final, and ex-post<sup>11</sup>) based on the project's expected outcomes

---

<sup>11</sup> The number of ex-post visits is limited to 20 projects per year (see section 1.4.2 Service 1 task 3)

declared at proposal submission stage, but considering also the actual results achieved by the project during its implementation. The external monitoring team will then be required to advise the Contracting Authority on the validity of the data provided by the beneficiaries including an assessment of whether these data appear technically reasonable.

See task 3.1 under Section 1.4.2.2. Service requested.

#### **1.4.1.2.5. Land purchase database (used by monitoring team)**

As described in task 2.4 under Section 1.4.2.2. Service requested, a Land Purchase Database (LPD) is used by the Contracting Authority to maintain information about land purchased under the LIFE programme, including the spatial boundaries of land parcels bought in projects funded under the LIFE programmes.

The database allows assessment of the impact of the land purchases and therefore provides means to monitor projects' use of the land after the end of the project implementation. More importantly, storage of spatial data makes it possible to display the land purchased with LIFE programme funding overlaid with other existing environmental spatial datasets, including through the public Natura 2000 viewer (Natura 2000 Network Viewer: <http://natura2000.eea.europa.eu/#>).

For user/access rights potential issues, the beneficiaries contact [CINEA IT Helpdesk](#) by creating a ticket.

#### **1.4.1.2.6. LIFE web presence (used by communication team)**

The LIFE programme has a dedicated web page at [https://cinea.ec.europa.eu/life\\_en](https://cinea.ec.europa.eu/life_en). The contractor, as described in task 4.3.2 under Section 1.4.2.2. Service requested, will produce content for that page such as news, articles, event announcements, and files provided by the Contracting Authority, linked to e.g. calls for proposals, and introduce it directly into the web content management application (Drupal).

A summary of each grant funded by the LIFE programme, including information on additional material produced by the grant as a result of its implementation, is to be published by the external communication team via Butler in the publicly accessible [LIFE project database](#).

#### **1.4.1.2.7. Audio-visual database (used by communication team)**

Each year, LIFE grants implementation results in a variable number of photos, illustrations, and videos. This material is stored in a searchable audio-visual database, catalogued according to copyright and themes, and used for communication purposes. The contractor is responsible for the uploading and cataloguing of this material as described in Service 4, Task 4.3.4 Databases.

#### **1.4.1.3. Close-to-Market (C2M) initiative**

The C2M initiative consists of a series of tailor-made support modalities, provided by business development experts, to all projects that registered themselves to the initiative. The support in the form of discussions, guidance and review is free of charge. If projects require more detailed analyses, they may buy-in external expertise or services from the market and the related costs could be eligible within the budget of the project.

Based on the current experience with grants financed under the Calls LIFE 2021-2024, the number of potential close-to-market projects is estimated at 65-70% of projects from the Circular Economy and Quality of Life and Climate Change Mitigation and Adaptation subprogrammes (i.e. around 160 C2M projects funded in the period 2021-2024).

See task 3.2 under Section 1.4.2.2. Service requested.

**1.4.1.4. Other input by the Contracting Authority**

The Contracting Authority will provide to the contractor all data and information required to perform its tasks and services. Data may be accessible via IT tools or will be transferred in electronic version otherwise.

*1.4.2. Detailed characteristics of the purchase*

1.4.2.1. Horizontal aspects to consider

The services to be delivered shall cover all countries participating in the LIFE programme, namely (as of early 2026) all the 27 EU Member States, Ukraine, Moldova, North Macedonia, Montenegro and Iceland, as well as the United Kingdom which previously participated in the programme. Any other countries joining the programme would be added to the [list of participating countries](#).

In very exceptional cases, the Contracting Authority may also request delivery in additional countries. For instance, the contractor may be requested:

- in EU candidate countries or future acceding countries prior to accession, to organise and/or participate in events to promote the LIFE programme;
- in European countries non-EU member states, such as Norway or Switzerland, to participate in events where a high participation of the LIFE target audience may be expected; and
- in any third country, to organise events such as side events including the participation of LIFE beneficiaries in high-level international events (such as multilateral environmental and climate agreements’ conferences of the Parties, World Circular Economy Forum, etc.).

The sections below set out the general and specific requirements for the services and tasks that may be requested as well as an indication of their expected quantities.

Tenderers shall indicate in the financial offer the prices required for each service, task or subtask, as applicable, in accordance with the pricing structure set out in these tender specifications and in the financial offer form. Depending on the item concerned, this may consist of a lump-sum price for a defined activity or period, or a lump-sum price per unit. Where relevant, the tender specifications indicate the estimated workload for pricing purposes. These estimates reflect the Contracting Authority’s assessment of the level of effort normally required to perform the tasks and deliver the corresponding outputs.

Tenderers must submit a technical offer describing how they will implement the services and tasks and a financial offer providing prices in accordance with the required price structure reflected in the financial tender form (Annex 6).

The technical offer must be of sufficiently detailed to enable the Contracting Authority to assess whether the tenderer demonstrates an efficient organisation of the work requested and is able to put together methodologies and teams to perform the requested services and tasks in an effective way. In particular, tenderers shall clearly describe the mechanisms proposed to reach the objectives set in these tender specifications, and to deliver the expected outputs. Where requested, tenderers shall also illustrate their offer with concrete examples.

The framework contract will require the contractor to make available to the Contracting Authority a pool of qualified personnel by May 2027 able to cover the services described under Section 1.4.2.2. Service requested, and to respond to specific requests for services launched by the involved Contracting Authorities. These specific requests will describe each assignment, including specific deliverables, leading to specific contracts.

All documents that are relevant for the monitoring of the current LIFE+ and LIFE programmes' grants (reporting, guidelines, Common Provisions/General Conditions for managing LIFE+ and LIFE action grant and operational grant) are accessible on the [LIFE website](#) or among the Funding & Tenders portal [reference documents](#) and guidance. These documents are regularly updated, including during the course of this procurement procedure.

#### 1.4.2.2. Services requested

The Framework contract will cover the following four services structured as follows:

### **Service 1. Overall coordination and support**

Task 1.1 Coordination team

Task 1.2 Establishing the Monitoring, Communication and Close-to-Market experts' teams

Task 1.3 Thematic Support team

### **Service 2. Technical and financial monitoring of grants**

Task 2.1 Monitoring of ongoing grants

Task 2.2 Ex post monitoring project visits

Task 2.3 Participating in Welcome Meetings

### **Service 3. Thematic support to LIFE Project Indicators, close-to-market projects and policy-related events, briefs and studies**

Task 3.1 LIFE Project Indicators (LPI) and processing of projects' data

Task 3.2 Support to close-to-market (C2M) projects

Task 3.3 Organising policy-related meetings and supporting LIFE participation in events

Task 3.4 Supporting national Info Days

Task 3.5 Delivering policy briefs and other reports and studies

Task 3.6 Follow-up monitoring of Green Assist assignments

#### **Service 4. Communication and logistics support activities**

Task 4.1: Communication tasks coordination and planning

Task 4.2: Editorial work and design

Task 4.3: Digital communication

Task 4.4: Production of audio-visual content

Task 4.5: Events and Promotional Material

##### **1.4.2.2.1. Service 1 – Overall coordination and support**

The main tasks under Service 1 consist in the setting up and management of the various teams required to perform all the tasks described in services 2, 3 and 4.

#### **Task 1.1 - Coordination team**

The contractor will set up a Coordination Team that will act as a single contact point for the Contracting Authority on all issues of a general and strategic nature. This team will comprise at least:

- a full-time General Coordinator,
- a full-time Quality Manager,
- a full-time Communication Coordinator,
- and a Close-to-Market Services Coordinator assigned at 70 working days per year.

The contractor shall propose in its offer an efficient communication process between the Coordination Team and the Contracting Authority. The main function of the Coordination Team is to ensure high-quality, timely and reliable provision of services. The Coordination Team will also ensure the administrative support for the contractor teams e.g. functional mailboxes linked to the contract's implementation, databases management, cataloguing of communication material and, linked to the organisation of meetings and events listed in services 2, 3 and 4, the organisation of travel for the contractor's staff as well as exchange of necessary data and information. During the implementation of specific contracts, the contractor must ensure continuity of service through appropriate back-up staff and IT systems.

The Coordination team will also cover Tasks such as Data management, including the LIFE Project Indicators database, the Land Purchase Database and Butler content, and will also ensure administrative follow-up.

To maintain a high level of service stability, any replacement of personnel must be managed so that knowledge and information are transferred without interruption of services. Each time a staff member involved in service provision is replaced, the contractor must ensure an effective handover of the appropriate knowledge and information in order to avoid any disruption of services and to maintain service quality at all times. The contractor must also inform the Contracting Authority of any such changes and seek approval for the replacement staff member. The need for close integration between the monitoring, communication and close-to-market tasks must be reflected in the team's composition and working relations. At least the following profiles shall be part of the Coordination team (see also section 3.2.3):

#### **B1 - General Coordinator**

The contractor must appoint a single coordinator for the entire team as General Coordinator. This person shall carry out the following tasks:

- Supervise and manage the timely delivery of high-quality work by the entire team;
- Work together with the Thematic Support Team;
- Act as a single contact point for the Contracting Authority on all issues of a general and strategic nature;
- Organise and/or participate in meetings, such as those listed in section 1.4.5.2, or upon request from the Contracting Authority;
- Provide the necessary feedback, both to the Contracting Authority and the entire team, to ensure a timely and satisfactory implementation of the services.

### **B2 – Process & Quality Manager**

The Quality Manager will carry out the following tasks:

- deliver a quality plan within the first month of the first specific contract, and update it whenever necessary and upon request from the Contracting Authority;
- ensure the overall implementation of the quality control measures included in the quality plan;
- analyse the Contracting Authority's feedback in order to provide timely and effective response to address quality issues, as well as improve processes in place within the team and with the Contracting Authority;
- identify risks and propose solutions to problems, bottlenecks, etc.

The quality plan must define Key Performance Indicators, targets and methodologies to ensure:

- compliance with quality standards (see section 1.4.5);
- timeliness and quality of response in responding to requests for services;
- timeliness in responding to correspondence from the Contracting Authority;
- compliance with deadlines;
- quality of contract management;
- quality of the services provided;
- quality of the products delivered;
- management of non-compliance occurrences and poor performance.

### **B3 - Communication Coordinator**

The Communication Coordinator will carry out the following tasks:

- Coordinate the tasks delivered within service 4;
- Propose communication strategies, as well as the planning of campaigns and activities delivered within service 4, and assess their impact on the target groups and the visibility of the LIFE programme;
- Organise monthly meetings (unless decided differently) with the Contracting Authority to report on the progress in communication tasks;
- Supervise and manage the timely delivery of high-quality work in the field of communication and events' organisation;
- Identify risks and propose solutions to problems, bottlenecks, etc. related to communication activities and events' organisation; and
- Support the General Coordinator in facilitating practical arrangements for any required meetings, event and missions of the team.

The Communication Coordinator shall play a key role in the implementation of Service 4 - Communication activities.

#### **B4 – Close-to-market Services Coordinator**

The Close-to-Market (C2M) Coordinator will carry out the following tasks:

- Coordinate the C2M-related tasks and activities;
- Oversee the implementation of C2M services such as mapping of C2M projects, helpdesk support, business coaching, mentoring, data analysis and C2M promotional activities;
- Ensure consistency and coherence across all C2M actions, including coaching, advisory, and communication activities targeting LIFE beneficiaries, in coordination with the Communication Coordinator;
- Monitor progress and ensure the timely delivery of high-quality outputs within the scope of C2M activities;
- Organise regular C2M coordination meetings (bi-weekly or monthly, unless decided otherwise) with the Contracting Authority to report on progress, discuss updates and findings and propose improvements;
- Identify risks, challenges or resource gaps affecting C2M delivery and propose appropriate solutions;
- Contribute to the definition and continuous improvement of the C2M actions and workflows;
- Support the General Coordinator in facilitating practical arrangements for any required meetings and events.

The C2M Coordinator shall play a key role in the implementation of Task 3.2 – Support to LIFE close-to-market activities.

It is estimated that the **Coordination Team** will need two administrative assistants full-time, to perform the following tasks:

- Provide administrative support e.g. functional mailboxes created or linked to the implementation of the services, organisation of missions including provisions of travel tickets, accommodation and subsistence for the contractor's staff;
- Provide technical and logistical support in the field of communication and close-to-market activities including for physical and online event organisation, databases management, cataloguing of communication material and other related tasks in line with the needs of the Contracting Authority.

For Task 1.1, tenderers shall submit one price as lump sum per 12-month period which shall form part of the price for Service 1. For indicative purposes only, the workload, including support by administrative assistants, is estimated at 1560 working days per 12-month period. Where the period concerned is shorter or longer than 12 months, remuneration shall be adjusted in proportion to the actual duration.

### **Task 1.2 - Establishing the Monitoring, Communication and Close-to-Market experts' teams**

The Contractor must set up a team with all the expertise and experience necessary to carry out the tasks described in these tender specifications, throughout the duration of the Framework contract, including appropriate back-up staff in the event of absences.

The Framework Contractor must inform the Contracting Authority in advance of any changes in the composition of the team during the performance of the contract, including departures, arrivals and promotions. New team members will have to be endorsed by the Contracting Authority before being allocated any task of this Framework contract.

The contractor shall ensure that its staff is properly trained, as described in section 1.4.5 Contractor training and meetings.

#### **a) Monitoring team (Technical and Financial)**

The contractor shall establish a team of monitoring experts to perform the following tasks:

- the technical and financial monitoring tasks described under Service 2 for all types of ongoing and future grants, and for the thematic areas described under Section 1.4.1 'Background', with the necessary linguistic coverage for all countries concerned and;
- the specific thematic support tasks described under the Service 3.

The monitoring experts are either technical or financial experts. Their key role is to assist the Contracting Authority's staff in the monitoring of projects benefiting from an action or an operating grant.

The contractor shall set up and maintain a database of:

- monitoring experts meeting the requirements of the profiles B5 to B9, B12 to B15 and P19 as defined in *section 3.2.3*,
- communication experts described below under point *b)* 'Communication team' meeting the requirements of the profiles B16 to B17 and P19 as defined under the *section 3.2.3*, and

- close-to-market experts described below under point c) ‘Close-to-Market team’ meeting the requirements of the profiles B10, B11 and B18 and P19 as defined under the *section 3.2.3*.

The database shall be set up and submitted with the offer in response to the first request for services, as part of the preparation process of the first specific contract, and shall be maintained throughout the duration of the framework contract. This database must be endorsed by the Contracting Authority, and include a sufficient number of experts to carry out the tasks described in these tender specifications.

The Contracting Authority may request the replacement of certain experts and shall be consulted of any changes to the database. The inclusion of a new expert in the database must be notified to the Contracting Authority by the contractor. Before that expert is assigned to a grant, the CV of the proposed expert must be presented to the Contracting Authority for its endorsement.

The **technical monitoring experts** will support the Contracting Authority in the monitoring of the grants, notably by carrying out the following tasks:

- Following and assessing the individual grants from a technical, financial, and administrative point of view and carry out related activities;
- Interacting with the Thematic Support Team in view of providing them with relevant grants results and identifying the grants with high communication or policy feedback potential;
- Act as contact point (both by email or phone) for the coordinating beneficiaries of action and operating grants during the implementation of their grants in order to clarify contractual, administrative and financial aspects of the grant implementation.

In addition, based on their expertise and experience, the technical monitoring experts may be allocated to tasks under the Service 3.

Each grant will be assigned, at all times, to a technical monitoring expert on the basis of two criteria:

- the **necessary** (at least level B2) **linguistic ability to communicate with the coordinating beneficiary in their national language**<sup>12</sup>;
- **technical expertise** on the main subject matter of the grant. This requirement does not apply to grants funded by the LIFE CET sub-programme - Coordination and Support Actions (CSA). For LIFE CET CSA, the contractor will not assign a technical monitoring expert, as the expected level of monitoring support to be provided within this Framework contract will be minimal and punctual, focused on financial assessment of payment requests (see task 2.1).

The total number of technical monitoring experts required will depend on the type and number of grants to be monitored, including grants under implementation and grants still to be selected, as well as on the specific thematic expertise and the related number of tasks to be performed.

---

<sup>12</sup> Please note that the LIFE 2021-2027 programme is [open](#) to non-EU members states countries. The language requirement also applies to these additional participating countries, although exceptions might be granted if a fluid communication with grant beneficiaries can take place in a different language spoken by grant beneficiaries and the technical monitoring expert.

The contractor shall adapt in a timely manner to variations in the number of grants per country and per thematic area, resulting from new grants selected after the annual call for proposals and from the number of closed grants.

Based on the estimated workload involved in performing the monitoring tasks described under Service 2, a full time<sup>13</sup> technical monitoring expert may be assigned between 10 to a maximum of 20 grants, depending on the nature of the grants.

The contractor must maintain the Contracting Authority updated on the list of experts and the attribution of grants as well as on changes in the list or attribution.

The **financial monitoring experts** will support the Contracting Authority in the financial monitoring of the grants, notably by carrying out the following tasks:

- Perform financial controls on mid-term/interim/final financial reports, to ensure that beneficiaries apply the administrative and financial rules as set out in the grant agreement. More in particular, sample and analyse relevant supporting documents in line with the ex-ante controls defined by the Contracting Authority;
- Provide an opinion on the reliability of the reporting and the eligibility/ineligibility of costs to the Contracting Authority.

The contractor will set up a pool of financial monitoring experts that will work in close collaboration with the technical monitoring experts on some monitoring tasks. For those tasks, the assessment of the two experts must be compiled in one single output. For some other tasks, the financial monitoring experts will perform the task independently from technical monitoring experts.

It is not requested that financial monitoring experts are assigned to grants in the Contracting Authority IT tools described in section 1.4.1.2 unless they are acting independently from the technical monitoring experts.

The number of financial monitoring experts required will depend on the number of ongoing grants to be monitored and, in particular on the number of financial reports to be assessed. The contractor shall adapt in a timely manner to changes in numbers of assessments to be carried out.

From the team of financial monitoring experts, the contractor will designate a Senior Financial Expert to act as focal point towards the Contracting Authority.

The Senior Financial Expert shall carry out the following tasks:

- act as a single contact point to the Contracting Authority for all horizontal issues related to financial monitoring;
- supervise and manage the timely delivery of a high-quality monitoring output from the financial monitoring experts team and provide feedback, both to the Contracting Authority and the contractor's Coordination and financial monitoring teams.

---

<sup>13</sup> Full time is defined as 220 working days of 8 hours.

Based on the workload estimated per task, approximately one (1) financial monitoring expert per 100 grants should be foreseen.

The contractor will ensure that the monitoring experts receive the adequate background and technical information to perform their tasks efficiently, in compliance with the profiles<sup>14</sup>. In particular, the contractor shall train the technical monitoring experts on the latest policy developments related to the LIFE programme. The contractor will make sure that the financial and monitoring experts have the necessary knowledge and understanding of the EU Financial Regulation and applicable LIFE financial rules, as well as of EU Member States'<sup>15</sup> relevant national rules.

The contractor shall ensure the full traceability and safety of all data and information related to the grants being monitored as well as monitoring outputs produced in the course of their assignment. The contractor shall ensure effective sharing, storing and updating of the information necessary for the monitoring activities. Any processing operations performed on behalf of the Agency/Commission are subject to Article 23 of Regulation (EU) No 2018/1725, and other specific instructions provided by the Contracting Authority in the context of the implementation of their service contract. This data management system shall be complete and operational at the latest three months after the signature of the first specific contract.

The contractor's use of such a system for the purpose described above does not preclude its obligation to use the IT systems provided by the Contracting Authority to submit the outputs produced during its monitoring activities.

The tenderers shall present, in their offer, the mechanism to be used for ensuring reliable technical and financial monitoring teams which meet the required expertise and linguistic requirements. In particular, the offer shall describe how the database will be maintained with a sufficient number of experts over time. Tenderers shall also describe how the performance of the monitoring experts will be monitored including verification that each task requested has been implemented, that the related outputs are of required quality and that they are delivered on time.

The offer shall describe the mechanism to ensure continuous training of the experts (see also section 1.4.5.1 Training).

The tenderers shall present the system foreseen to ensure the security of all data and information related to grants being monitored and the effective sharing, storage and updating of the information necessary for the monitoring activities. The offer shall provide precise information about the time required to put the system in place and to ensure its completeness.

It is not expected that the Contracting Authority will require the contractor to assign technical monitors to grants selected under the LIFE CET subprogramme. However, the Contracting Authority may request service from the contractor for stand-alone financial assessments and ex-ante controls of CET grants (please refer to section 1.4.2.2.2 task 2.1 for more information) as well as support for the LIFE Project Indicators (LPI) related to CET grants (please refer to section 1.4.2.2.3 task 3.1).

<sup>14</sup> Profiles are listed and described further down in section 3.2.3 Technical and professional capacity (profiles B5, B6, B7, B9, B12, B13, B14, B15)

<sup>15</sup> EU Member States, including overseas countries and territories (OCTs), and in the countries associated to the LIFE Programme ([participating countries](#)).

#### b) Communication team

The contractor shall establish a team of qualified experts capable to cover the functions, services and tasks described below and in Service 4, and to respond to specific requests launched by the Contracting Authority. These specific requests will describe and quantify each assignment including the relevant deliverables and shall lead to the conclusion of specific contracts under this Framework contract.

The contractor will provide a clear description of who within the communication team is in charge of the different communication tasks and will define a single contact point for each task.

The communication experts will carry out tasks related to the services described in Section 1.4.2.2.4 Service 4 (indicative list):

- Contribute to the planning of communication activities by researching and analysing information and data on the LIFE programme, grants funded and related EU policy initiatives;
- Plan, conceive and deliver events (virtual, physical and hybrid), provide thematic support to and coordinate the participation of the beneficiaries of LIFE grants in events including third party events;
- Conceive and produce communication material, including copywriting and audio-visual production; and
- Provide digital communication services including social media management, web editing and web design.

#### c) Close-to-Market team (C2M)

The contractor shall establish a team of qualified close-to-market and coaching experts capable of carrying out the functions, services and tasks described below and in Service 3 (under Task 3.2), and of responding to related requests from the Contracting Authority. The contractor shall provide a clear description of the allocation of responsibilities within the C2M team, indicating who is in charge of each task, and shall designate a main contact point for every task.

The C2M experts will carry out implementation of the tasks related to the services described in Section 1.4, Service 3 - Task 3.2 (indicative list), ensuring efficient delivery of contract objectives and high-quality support to LIFE beneficiaries and the Contracting Authority.

C2M experts will:

- coordinate and plan activities, monitor progress and prepare technical and financial reports, ensuring quality, consistency and timely delivery;
- identify, classify and analyse LIFE projects relevant to market uptake, innovation and circular economy goals. They will detect promising projects and trigger their market readiness through targeted support;
- provide on-demand guidance on close-to-market and business-related aspects, acting as the first point of contact for LIFE beneficiaries on the market related issues;

- deliver tailored coaching and mentoring to strengthen beneficiaries' market readiness and investment attractiveness; they will conduct remote and on-site missions and, where relevant, facilitate access to incubation or investor pitching opportunities;
- promote LIFE close-to-market results, communicate available support services and deliver training and upskilling activities; establish new links with private sector networks and business associations to enhance the LIFE programme's visibility;
- process and analyse project data, including through [EU Innovation Radar](#) questionnaires and C2M checklists, to assess innovation maturity and market potential and to support evidence-based reporting and planning;
- perform administrative and logistical tasks, maintain accurate records and ensure an effective handover and continuity of activities at contract closure.

The contractor will ensure the (monitoring, communication and C2M) experts' participation in the meetings described under the section 1.4.5.2 Meetings, as applicable per (kind of) meeting. This includes not only to make the experts available, but also to organise, coordinate and bear the related logistical arrangements and costs, if any.

The costs of participation of experts to those meetings shall be covered by unit prices offered for the tasks under the Services 2 to 4, except for the case of the Annual Monitoring Review meeting.

The costs of organisation and participation of experts to the Annual Monitoring Review meeting will be covered by a lump sum, which will constitute a part of the fixed cost for Service 1 (see annex 6).

### **Task 1.3 - Thematic Support team**

The functions of the Thematic Support team will be:

- providing experts with the possibility to exchange knowledge about the projects and operating grants they follow per thematic area, in particular thanks to the related LIFE Projects Indicators (LPI);
- augmenting the monitors' ability to provide, in their assessment or interaction with beneficiaries, consistent recommendations based on best practices within a thematic area and thus to support beneficiaries in improving the quality and extent of project and operating grant results;
- providing feedback to the Contracting Authority relevant to the LIFE programme's contribution to development and implementation of EU environment and climate policy.

The contractor will establish a **Thematic Support Team** to provide these functions. The team will be composed of senior thematic experts<sup>16</sup> in the following fields: resource efficiency, including circular economy, bioeconomy, zero pollution and quality of the environment (namely water, air and noise, soil and chemicals management), nature and biodiversity, climate change governance and information, climate change mitigation, climate change adaptation and resilience, energy, as well as NGO operating grants and data management.

---

<sup>16</sup> Please see the profiles under the section 3.2.3

The tasks performed by the Thematic Support Team are listed below. Beyond their specific tasks, the experts of the Thematic Support Team will also coordinate and quality-check the work performed in the tasks of Service 3.

The experts who will be part of the Thematic Support Team will have up-to-date knowledge of EU policies related to all policy areas of the grants. Those experts may also be part of the External Monitoring Team.

The list of tasks below including the indicative workload and volume (e.g. number of events or tables etc.) are only provided to enable the tenderer to provide a price for the fixed cost of the Service 1. It is foreseeable that variations occur during the implementation of the Framework Contract; in that case the contractor will ensure that all the tasks requested are performed.

For this component (Task 1.3), tenderers shall submit one price as lump sum per 12-month period which shall form part of the price for Service 1. Where the period concerned is shorter or longer than 12 months, remuneration shall be adjusted in proportion to the actual duration.

a. Projects mapping

The Thematic Support team will maintain the existing ‘mapping’ of projects applied to all traditional and integrated projects from the LIFE 2014-2020 programme as well as to standard action projects and strategic projects from the LIFE 2021-2027 programme. The mapping files include project data, including cost related information, together with other relevant information, such as the EU legislation concerned, relevant EU action plans, and technology or industry targeted. Currently approximately 1300 projects are included in 22 tables. An example of the data included in the tables is provided in the Annex 7– Relevant information for tenderers. Some projects may be included in several tables. The total number of tables may vary over time. The Contracting Authority will transfer the existing project mapping tables at the latest three months after the signature of the first specific contract.

The Thematic Support Team will include in the relevant project mapping all newly selected Standard Action Projects and Strategic Projects under the 2027 LIFE calls, no later than two months after the relevant Welcome meeting events, which are expected to take place respectively in autumn of the year following the call and in the subsequent winter.

Other updates to the mapping files might be requested by the Contracting Authority (e.g. adding new relevant legislation or policies and flagging relevant projects in the files).

The mapping should be accessible to the Contracting Authority and to the technical monitoring experts. As described under Service 2 task 2.1, technical monitoring experts will update the information on the projects assigned to them when performing their monitoring tasks.

The indicative workload is estimated at 100 working days per year.

b. Ad-hoc requests

Upon request, the Thematic Support Team shall provide the Contracting Authority with lists of relevant grants and related information for use in policy-related work, briefings, speeches and background material. The number of such requests is expected to range from 35 to 55 per year. A repository of those requests shall be established and kept up to date. It shall be accessible to the Contracting Authority and shall include the outputs provided.

The indicative workload is estimated at 110 working days per year.

c. Ex-post monitoring project visits

The Thematic Support Team will oversee the organisation and delivery of ex-post monitoring visits on closed projects. The purpose of these visits is to verify the sustainability of project actions and results, the long-term impact in view of the original project scope, the actual dissemination of knowledge acquired, and the replication of the solution proposed. These ex-post visits also serve to collect information that is useful for the management and promotion of the programme, for the development and implementation of relevant policies, and for external communication activities.

The Contracting Authority will set, with support from the contractor, criteria to select the themes and projects for ex-post monitoring. The criteria will consider thematic, temporal and/or geographical context as well as previous ex-post visit themes and the EU policy agenda. The Thematic Support team will propose a list of projects meeting the criteria.

The Thematic Support Team will coordinate and quality-check the work done by the Technical Monitors who will perform the project visits<sup>17</sup>, as described under section Service 2. Task 2.2 Ex-post monitoring project visits.

In addition, after the visits, the Thematic Support Team will compile all individual reports in a single electronic report<sup>18</sup>. This report must include an overall analysis of the findings and suggestions, including for improving LIFE projects' sustainability. When relevant, the results of the ex-post monitoring visits will be used by the Contracting Authority or other European Commission Services for the preparation of documents supporting thematic dissemination or policy feedback.

The contractor will prepare a summary of the ex-post visit findings to be published on the LIFE website as well the elements to update the [LIFE Public database](#) of projects. After the approval by the Contracting Authority the contractor will input the information in BUTLER for publication.

<b>Task</b>	<b>Estimated workload per unit output in working days (wd)</b>	<b>Deadlines to submit the output</b>	<b>Outputs expected</b>
Oversee the organisation and delivery of up to 20 ex-post monitoring visits per year	25 working days per year	End of the 1 <sup>st</sup> semester of each calendar year	Criteria (theme), long and final lists of projects to be visited
		End of the second semester of the calendar year	Overall analysis report and public summary

<sup>17</sup> Financial monitors might join (virtually or physically) part of a project visit to discuss/clarify financial issues, for duly justified cases (e.g. project facing multiple financial issues and reporting non-compliance that may entail relevant grant cuts), with prior approval or upon request from the Contracting Authority.

<sup>18</sup> Examples of compilation report:  
[https://cinea.ec.europa.eu/publications/digital-publications/life-soil-ex-post-study-final-report\\_en](https://cinea.ec.europa.eu/publications/digital-publications/life-soil-ex-post-study-final-report_en)  
[https://cinea.ec.europa.eu/publications/digital-publications/life-marine-protected-areas-ex-post-summary-report\\_en](https://cinea.ec.europa.eu/publications/digital-publications/life-marine-protected-areas-ex-post-summary-report_en)

#### d. Welcome meetings

The Thematic Support Team and the Communication Coordinator will oversee the organisation and delivery of the events gathering newly selected projects, the so-called Welcome meetings (see further information linked to logistics in tasks 4.5.3.a and 4.5.3.b).

The Welcome meetings have a two-fold objective: (i) presentation and discussion around projects' technical scope, expected policy impacts, and sustainability and replication aspects, in *thematic* sessions, and (ii) provision of the main administrative and financial information needed for smooth implementation of projects from the start, including on communication matters, in *horizontal* sessions. Those meetings are one of the first milestones of the monitoring work. The Thematic Support team will prepare the content of both thematic and horizontal sessions.

For the horizontal session, the Thematic Support team shall propose to the Contracting Authority an agenda covering the topics that are relevant for smooth project management, in particular for newcomers to LIFE funding.

For the thematic sessions, the Thematic Support team will collect and process the projects' data and provide an overall analysis to allow the presentation and/or discussion around projects' technical scope, policy impacts, sustainability, replication and networking. This analysis will be based on the Project Initial Documents that will be prepared by the assigned technical monitoring experts under Service 2 task 2.3 Participating in Welcome meetings.

During the event, the Thematic Support team will also support the meeting's delivery (e.g. providing presentations, facilitating discussions, etc.) including providing the material to be used for external communication.

At the end of each event, a report will be prepared with a specific part for each sub-group, a section focussed on lessons learned and recommendations, as well as an analysis of the participants' evaluations.

<b>Tasks</b>	<b>Estimated workload per unit output in working days (wd)</b>	<b>Indicative number of tasks likely to be requested</b>	<b>Outputs expected</b>
Organise the Welcome meeting of Standard Action Projects	5 wd per horizontal session (session of max. 1 day) 12 wd per thematic group	1 horizontal session per year 20 thematic groups with an average of 8 projects per group and per year	Agenda of the horizontal session and thematic groups when relevant All new projects plus some ongoing projects are invited to attend (project lists to be provided by Contracting Authority) Event report
Organise the Welcome meeting of Strategic Projects	40 wd per event	2-day events with on average 10 new projects per year	

#### e. Support to thematic input to publications and events

The Thematic Support Team will build on the work of technical monitoring experts involved in providing thematic input to publications and events. In particular, the role of the Thematic Support team will identify relevant thematic topics and support the preparation of agreed publications and events, by e.g. identifying and possible synergies between grants working on similar thematic areas in different regions.

The indicative workload is estimated to be 60 working days per year.

f. Support to gathering of projects' indicator data and LIFE programme reporting

LIFE beneficiaries are requested to provide environmental and socio-economic impact indicators (LIFE Project Indicators – LPIs) necessary for assessing the implementation and the performance and impact of the LIFE programme<sup>19</sup>. This information is also used in the preparation of replies to requests, such as, for example, Parliamentary questions, and for policy development purposes.

The Thematic Support team will act as a central point of contact in the verification of LPIs and support of projects in fulfilling their obligations. The team may assist the Contracting Authority in terms of appropriate management of impact indicator processes and resources (e.g. ensuring timely delivery); defining methodologies and good practices for the assessment of the project results; developing guidance and training including for the use of the LIFE LPI webtool (e.g. events, as well as, written and audio-visual material); troubleshooting of issues (if needed with the assistance of the Contracting Authority) identified by the LIFE LPI webtool users; advice for improving the LIFE LPI webtool and relevant processes based on user inputs; data processing, analysis and reporting on a project and programme level.

The indicative workload is estimated to be 60 working days per year.

The tenderers shall detail in their offer the structure and functioning of the Thematic Support team and the mechanisms that they will put in place to ensure its efficiency and efficacy to fulfil each of the functions listed. In particular, the tenderers will describe how they will organise the relation between the Thematic Support team and the individual technical monitoring experts.

The table below provides an overview of the indicative workload linked to service 1 for four years:

<b>Tasks</b>	<b>Estimated total workload in working days (wd) for 4 years</b>
<b>1.1 Coordination team</b>	6240
<b>1.2 Establishing the Monitoring, Communication and Close-to-Market experts' teams</b>	
Participation of experts in Annual Review meeting	12 per monitoring, communication or close-to-market expert
<b>1.3 Thematic support team</b>	
a- Project mapping	400
b- Ad-hoc requests	440
c- Ex-post monitoring project visits	100
d- Welcome meetings	1140

<sup>19</sup> See [Programme Performance Statements - European Commission](#) and [LIFE - Performance - European Commission](#)

e- Support to thematic input to publications and events	240
f- Support to gathering of project indicator data and LIFE programme reporting	240

#### 1.4.2.2.2. Service 2: Technical and financial monitoring of grants

##### **What do the Contracting authorities expect from the experts of the Monitoring experts' team?**

Monitoring experts will perform a series of tasks in the course of their assignments to grants. A more detailed description of these tasks is provided below under this Service. They shall not take any decision related to the grant management on behalf of the Contracting Authority (e.g. final decisions on costs eligibility, acceptance/rejection of payment and amendment requests).

The Contracting Authority shall request from the Monitoring experts the performance of monitoring task through the dedicated grant management IT tools<sup>20</sup>, except for tasks that do not entail the delivery of an official output, for example a phone call to check on a specific issue.

Task implementation shall start only when the Monitoring expert receives the relevant request.

A technical monitoring expert shall be assigned to each grant. Monitoring experts shall verify that the beneficiaries implement actions as indicated in the grant agreement and in subsequent Contracting Authority decisions, as well as in any related supplementary agreements or additional clauses. When any important or urgent issue is encountered in a grant, it must be reported immediately<sup>21</sup> by the Monitoring experts to the Contracting Authority's relevant staff.

The Monitoring experts shall assess each grant's progress at technical level as well as its environmental and climate impact, including in the medium and longer term (sustainability)<sup>22</sup>. In addition, the Monitoring experts shall assess each grant's financial development and grant management, in particular the technical coherence with the incurred costs and eligibility of the costs incurred when relevant.

Tenderers are invited to check the current standard formats of LIFE+<sup>23</sup>, LIFE 2014-2020 and LIFE 2021-2027 beneficiaries' reports, to better understand the workload linked to the assessment of such reports. It is to be noted that the beneficiaries' reporting templates may evolve during the course of the implementation of the framework contract, e.g., in view of simplification.

The Monitoring experts will also assess whether each grant correctly applies the contractual and financial rules as set out in the respective grant agreements<sup>24</sup>. This analysis includes, but is not

---

<sup>20</sup> Via the IT tools used for the project management i.e. BUTLER.

<sup>21</sup> Such important issues may be related to constraints faced during the implementation of the project and could lead to an early warning on potential difficulties to be expected in the project. Also included are significant positive developments that may be worth sharing with the Contracting Authority.

<sup>22</sup> The sustainability of the project results in the medium and long term is the capacity to maintain them after its implementation, be it by continuation, by replication or by transfer. Continuation means the continued use by the entities involved in the project of the solutions implemented during the project after its end. Continuation may also entail further spread geographically. Replication means, the solutions applied in the project are used again in the same way and for the same purposes by other entities/sectors during or after the project end. Transfer means that solutions applied in the project are used in a different way or for a different environment, climate action or related governance and information purpose by the same or other entities/sectors during or after the project end.

<sup>23</sup> The LIFE+ reporting template are to be found under the LIFE webpage [https://cinea.ec.europa.eu/life/project-administration-life-2007-2013\\_en](https://cinea.ec.europa.eu/life/project-administration-life-2007-2013_en), and the LIFE 2014-2020 and LIFE 2021-2027 projects reporting requirements are to be found under the webpage [https://cinea.ec.europa.eu/life/life-reporting\\_en](https://cinea.ec.europa.eu/life/life-reporting_en)

<sup>24</sup> For LIFE+ projects the Common Provisions are found under the webpage [https://cinea.ec.europa.eu/life/project-administration-life-2007-2013\\_en](https://cinea.ec.europa.eu/life/project-administration-life-2007-2013_en), and LIFE 2014-2020 projects models of Grant agreement are to be found under the LIFE webpage [https://cinea.ec.europa.eu/life/contract-and-financial-aspects\\_en](https://cinea.ec.europa.eu/life/contract-and-financial-aspects_en). For LIFE 2021-2027, the Model of grant Agreement can be found on the Funding and Tenders portal webpage [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/life/agr-contr/mga\\_life\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/life/agr-contr/mga_life_en.pdf)

limited to, checks of the supporting documents provided by the beneficiaries. Financial guidelines for the LIFE programmes and the annotated grant agreement for the LIFE programme as of 2021 are available on the [LIFE website](#) and on the [Funding and Tenders Portal](#).

This analysis will result in a critical assessment of the progress made as compared to the original plan agreed and included in the grant agreements, and in feedback to the Contracting Authority on achievements and impacts.

The Monitoring experts will also perform ex-ante financial controls based on supporting documents that will be sampled<sup>25</sup> and analysed by the Financial Monitoring expert. The findings and recommendations will be included in the monitoring report of the grant's mid-term/final report.

The Monitoring experts will perform project visits<sup>26</sup>. Those visits may be done either virtually, using teleconference tools, or physically on site<sup>27</sup>. Most physical visits will take place within the EU, and in rare occasions to countries associated to the LIFE Programme ([participating countries](#)).

At least two months before the visits, the Monitoring experts will confirm the visit dates to the Contracting Authority staff for their agreement<sup>28</sup>. The Monitoring experts will report back on the finding from the visits.

The visits aim to provide the Contracting Authority with:

- (i) detailed analysis on the compliance with the provisions of the grant agreement, in particular as regards the reliability of the reporting;
- (ii) assessment of the quality of their financial, managerial and administrative systems with respect to the grant agreement provisions;
- (iii) the assurance that the project results are correctly estimated on the basis of the key performance indicators and can be reasonably reached in the given timeframe;
- (iv) the level of achievement, impacts and quality of the activities carried out for the implementation of the action or work packages including due project deliverables (for the latter, the Monitoring experts will assess due deliverables formally submitted in the IT system, not drafts, while for other due deliverables the Monitoring experts will comment on the status, flagging substantial delays).

During the first project visit, the Monitoring experts will check that the beneficiaries have set up a correct and reliable reporting, accounting, and time registration system for the project.

---

<sup>25</sup> The sampling will be done either during project visits or upon request by the Contracting Authority.

<sup>26</sup> Financial monitors might join (virtually or physically) the technical monitors in part of a project visit to discuss/clarify financial issues, in duly justified cases (e.g. project facing multiple financial issues and reporting non-compliance that may entail relevant grant cuts), with prior approval or upon request from the Contracting Authority.

<sup>27</sup> Please refer to the table below for more information on the indicative number and type of visits.

<sup>28</sup> Via the IT tools used for the project management

The contractor will be requested to perform additional visits to some selected<sup>29</sup> “close-to-market” projects, or to include an additional close-to-market dedicated discussion to default project visits (see text box below for further information).

Once during each project’s lifetime, Contracting Authority’s staff may visit the projects in person accompanied by the Monitoring expert(s). The Contracting Authority visits will focus on assessing project achievements (environment and climate benefits, sustainability<sup>30</sup> and policy impact), and on proposing corrective or additional measures either to address issues or to maximise the project achievements (especially if this joint visit takes place in mid-implementation and not close to project end).

The Monitoring experts will organise those joint visits in close cooperation with the Contracting Authority including a preparatory meeting and the delivery of a summary of the preparatory meeting, with a list of points for the Contracting Authority staff to convey to the project coordinator prior to the visit. This ensures that the Contracting Authority staff has the necessary details to be able to fulfil their role in the context of the legal relationship between Contracting Authority and grantee, and to serve as conduit for policy feedback to Commission services.

To enable a proper planning by the Contracting Authority staff of joint visits, the technical monitors shall inform the CA annually, in autumn and before mid-November, of the project visits planned/proposed (whether joint or by Monitoring experts only) to the projects in the following year.

The table below summarises the frequency of the monitoring and assessment requirements linked to payment requests and project visits, depending on the project type.

**Financial monitors** may be requested to join the discussions on financial aspects during project visits either virtually, as the default option, or physically, where if prior virtual communication on financial matters has clearly proven insufficient. Some participation may be requested for some visits, in particular in the following cases:

- the first two visits to STRAT and BEST projects, with virtual participation for the first visit and physically for the second visit, which takes place shortly before the first interim report;
- cases that involve complex financial or administrative issues requiring prompt clarification or support that cannot be properly addressed by the technical monitor alone;
- projects with a substantial budget, for example above EUR 15 million or a high number of participants, for example 10 or more, where the Contracting Authority considers such participation necessary in light of other relevant factors, such as project complexity or the contractor’s lack of prior LIFE experience or track record.

The Contracting Authority may also request the organisation of additional visits in the following circumstances:

- If an amendment accepted by the Contracting Authority results in an increase in the number of payment-linked reports during the project implementation;

---

<sup>29</sup> Since 2016, some LIFE calls for proposals make reference to “close-to-market projects”, i.e. projects aiming not only at delivering improved environmental solutions, but also at making sure such solutions are widely taken up by society and the economy through an explicit market-oriented approach.

<sup>30</sup> Sustainability being achieved through continuation, replication and/or transfer (see footnote 22 above).

- If it considers a project to present a risk, or where the status of the implementation requires an additional visit to support decisions affecting project implementation;
- If the period between two reports linked to payment is three years or more, in which case an additional visit shall be carried out in the meantime.

It is foreseen that the number of additional visits will represent on average around 10% of the number of visits listed in the table below. Those additional visits may be carried out virtually, if their objective can be achieved without on-site checks or discussions.

The figures provided in the indicative workload tables at the end of task 2.1 include this additional 10% and take into account that financial monitors will participate in some of those visits.

Combining C2M visits (task 3.2) with default monitoring visits (task 2.1)

As described in Task 3.2 Support to close-to-market (C2M) projects, certain projects shall also receive additional half-day online and on-site visits to provide hands-on business development guidance.

Those visits are complementary to the visits listed in the table below, are estimated at 15 to 20 per year, and will be covered under Task 3.2. Where possible, these sessions should be combined with the default monitoring visits typically carried out at interim or further pre-financing reporting stage.

Project type <sup>31</sup> (IT tool <sup>32</sup> )	Reports to be assessed	Frequency and type of project visits
<b>LIFE+ and LIFE 2014 - 2020 Programme (project data and management via Butler, eProposal and paper version)</b>		
Traditional projects Preparatory projects	Progress report (not linked to a payment) Mid-term report <sup>33</sup> Final Report	Three visits during the project duration: one in the first year of implementation (already performed for all 2014-2020 and earlier projects), one before the further prefinancing payment, and one before the project end-date. The visit in the first year will be virtual for approximately 70% of the projects (30% physical), and in rare occasions other visits might be virtual, if so agreed by the Contracting Authority <sup>34</sup> . When calculating the financial offer it shall be assumed that all visits after the first one are physical.

<sup>31</sup> See section 1.4.1.1 for the project types.

<sup>32</sup> See section 1.4.1.2 for the lists of IT tools potentially used by the contractor.

<sup>33</sup> The number of mid-term reports is one per project, except in rare cases of a second additional pre-financing payment.

<sup>34</sup> Project visits will be virtual only if their objective can be achieved without on-site checks/discussions. This applies as well to physical visits to other kinds of grants.

Integrated Projects	Interim reports at the end of each phase  Final report	Two visits during the project's 1 <sup>st</sup> phase (already performed for all 2014-2020 projects), and one physical visit per phase <sup>35</sup> before the end of each subsequent phase. In rare occasions those visits may be virtual. When calculating the financial offer it shall be assumed that all visits are physical.
<b>LIFE 2021-2027 Programme (Project data in Funding &amp; Tenders Portal, project management via Butler)</b>		
Standard Action Projects (SAP)  Technical Assistance – PLP  Technical Assistance – CAP	Additional prefinancing report <sup>36</sup>  Final Report	Three visits during the project duration: one in the first year of implementation, done virtually (with some exceptions <sup>37</sup> ), one before the further prefinancing payment, and one before the project end date. The visit in the first year will be virtual for approximately 70% of the projects (30% physical), and in rare occasions other visits might be virtual, if so agreed by the Contracting Authority. When calculating the financial offer it shall be assumed that all visits after the first one are physical.
Strategic Projects (SIP and SNAP)	Interim report at the end of each phase  Final report	Two visits during the project's 1 <sup>st</sup> phase – the 1 <sup>st</sup> being virtual 50% of the times, and 50% physical – and one physical visit per phase before the end of each subsequent phase. In rare occasions some of those visits may be virtual. When calculating the financial offer it shall be assumed that all visits after the first one are physical.
NGO Operating Grants  Technical Assistance projects TA-PP  Technical Assistance project TA-R	Final report	Upon request, based on risk assessment, the visit may be done virtually or physically. When calculating the financial offer it shall be assumed that 40 physical visits shall be carried out in total during the Framework contract, and none virtually.
Other action: BEST	Interim report  Final report	
Other action: Coordination and Support Actions (CSA)	Additional pre-financing report  Final Report	No technical monitoring of those actions is foreseen. However, sampling of supporting documents, analysis of these documents and assessment of financial statements may be requested.

<sup>35</sup> Integrated and Strategic Projects are long projects divided into typically 3 phases, each lasting typically 2-3 y.

<sup>36</sup> The number of additional prefinancing reports is one per project, except in rare cases of a second additional pre-financing payment.

<sup>37</sup> A physical (instead of virtual) first project visit should be performed to projects for which checking on the ground is essential as a measure to prevent cost claims linked to actions that took place before the project started.

For all projects, at the stage of the final report submission, the technical monitoring experts will contribute to the update of the project data included in the [LIFE public Database](#). The technical monitoring experts shall provide the elements to update the project public summary<sup>38</sup>. In addition, for all closing LIFE projects that purchased land during their implementation, there is a contractual obligation to upload data and information to the Land Purchase Database (LPD). The Technical Monitoring expert assigned to those projects will verify the data included by the project and provide guidance when required.

At the start of each project, the monitoring experts shall create a so-called “project file” containing up-to-date information for all projects benefiting from an action grant and shall submit a final version once the project is closed. The project files shall serve as repositories for the history of each projects’ progress and outcomes. Whenever a visit has taken place, or a report or amendment request submitted from the beneficiaries has been assessed, the project file shall be updated, and this updated version submitted to the Contracting Authority together with the specific monitoring output.

Twice a year (March/April and October/November), the technical monitors shall contact a series of projects agreed in advance with the Contracting Authority, for which no project visit or report assessment took place during the previous six months and none is expected to take place by the end of May for contacts in March/April or by end of December for contacts in October/November. The purpose of these contacts is to get an update on implementation progress and challenges, and to better plan monitoring actions.

The technical monitors shall inform the Contracting Authority of the outcomes of these contacts by email for all projects in the case of contacts in March/April, and only for projects with no complex issues in the case of contacts in October/November, or with a technical note for projects presenting complex issues in the case of contacts made in October and November. They shall suggest monitoring actions to be carried out during the following six to twelve months. Upon request of the Contracting Authority, a discussion on the suggested actions may take place between the technical monitors and the staff of the Contracting Authority. See “Online inventory meetings” under section 1.4.5.

The technical monitoring experts shall contribute to the organisation of the events gathering newly selected projects, namely the Welcome Meetings events.

For each of the tasks above, the technical monitoring experts shall prepare a report and provide their input using the templates agreed with the Contracting Authority. In their offer, the tenderers shall not propose modifications to the templates; however, during the implementation of specific contracts, if adjustments to the templates are necessary, the Coordination Team will be asked to provide inputs.

A set of standard models and examples for the assessment or project visits reports are available in the Annex 7–Relevant information for tenderers.

The current templates are indicative and may be subject to changes upon the decision of the Contracting Authority in view of simplification or adaptation to new legislation (e.g. new Financial Regulation).

Queries from grant beneficiaries raised outside of project visits

---

<sup>38</sup> The Technical Monitoring experts will provide the elements in their assessment. The update of the project public summary is made in cooperation with the communication team.

The technical monitoring experts (or any other member of the contractor’s team) shall not take any decision related to the grant management on behalf of the Contracting Authority (e.g. final decisions on costs eligibility, acceptance/rejection of payment and amendment requests).

The replies provided by the technical monitoring experts to queries from grant beneficiaries, after consultation with other staff of the contractor’s team when necessary, are meant to provide preliminary guidance to coordinating beneficiaries, on how to ensure proper grant management in line with the grant agreement requirements for example on reporting templates. These replies shall be factual, based on guidance agreed with the Contracting Authority such as FAQ, guidance documents, training material, and shall not involve any decision related to the grant management.

Where a question requires the attention or a decision of the Contracting Authority, it must be forwarded to the Contracting Authority’s staff in order to decide on the most appropriate follow-up. Upon the signature of the framework contract, the Contracting Authority will provide a list of possible identified issues that, if detected, must trigger an alert from the technical monitoring experts to the Contracting Authority staff assigned to the corresponding grant.

The workload for replying to questions from coordinating beneficiaries, excluding project and operating grant visits, is estimated at an average of 3 working days per open grant<sup>39</sup> per 12-month period.

#### Ad hoc support requests by Contracting Authority

Contracting Authority’s staff may request ad-hoc support of technical and financial monitoring experts assigned to grants at any time, including outside the course of a specific monitoring task assignment. These ad-hoc requests may concern clarifications on grant implementation such as discussing potential delays or upcoming monitoring tasks. The input of technical and financial monitoring experts is estimated on average to 0.75 working day per open grant<sup>40</sup> per year.

For this component of Task 1.2, tenderers shall submit one annual lump-sum price per open grant. This price will form part of the variable price for Service 1. For indicative purposes only, the workload for ad hoc support requested by the Contracting Authority’s staff is estimated at an average of 0.75 working day per open grant per 12-month period. Where the duration of performance is shorter or longer than 12 months, remuneration shall be adjusted in proportion to the actual duration

### **Task 2.1 Monitoring of ongoing grants**

The Monitoring experts will perform a series of tasks upon request from the Contracting Authority and will upload their outputs into the grant management IT tools, i.e. Butler and LPI webtool or any IT tool that may be used in the future.

---

<sup>39</sup> A grant is considered technically “open” for the input of the monitoring team until the final payment has been paid.

<sup>40</sup> A project is considered technically “open” for the input of the monitoring team until the final payment has been paid.

For requests requiring a formal written output, the Contracting Authority will send the request to the technical monitoring expert assigned to the grant<sup>41</sup> through 'Butler'. The request shall specify the deadline for submission of the monitoring outputs.

For LIFE CET Common Support Action (CSA) grants, the Contracting Authority will send the requests through 'Butler' to the financial monitoring expert assigned to the grant. The request shall specify the deadline for submission of the monitoring outputs.

No other means than the IT tools shall be used to request formal written monitoring outputs from the technical monitoring experts. Informal feedback may be requested by other means such as phone, video calls or emails.

Unless otherwise specified, the technical monitoring experts shall involve the financial monitoring experts in the assessment of the mid-term, interim and final reports and in the performance of ex-ante controls as established by the Contracting Authority.

Where relevant, the technical monitoring experts shall involve the financial monitoring experts in other monitoring tasks.

The grant beneficiaries upload their reports and deliverables directly in the IT tools.

### **For each task involving a formal written output**

The Monitoring experts shall submit a report containing their assessment of all elements examined during the performance of the task, including, technical, financial, policy impact, communication potential, and amendment eligibility aspects. In addition, each report must contain a summary of key points for the consideration of the Contracting Authority in a format that may be used in further communication with the beneficiaries (formal, concise, polite and clear English language). The report shall be drafted in English for any grant supported by the LIFE programme. The report shall be revised if needed, addressing the comments by the Contracting Authority.

For the projects funded under LIFE+, the report shall be drafted in English. The key points shall also be provided in the language of the grant agreement, which may be any EU official language except Irish and Maltese that were not yet official EU languages under the LIFE+ Programme, together with an English translation for the Contracting Authority.

In the course of each task, the Monitoring experts may alert the Contracting Authority if there is any missing information and/or if clarifications are required from the beneficiary in order for the experts to complete their assessment.

### **For all grants**

Monitoring experts shall assess the grants' technical and financial progress and management, in particular its technical coherence with the incurred costs and eligibility of the costs incurred when relevant.

The assessment of payment requests shall also include the assessment of the submitted deliverables which are due in the corresponding reporting period.

---

<sup>41</sup> This applies to all projects except LIFE CET CSA

Monitoring experts may be requested to assess additional technical or financial documents submitted by the beneficiaries in the course of either an assessment or following contradictory procedures.

In some cases, the payment request submitted by the beneficiaries may lack the clarity or completeness to allow a proper assessment of the project progress and costs incurred. In such cases, the technical monitoring expert shall alert the Contracting Authority. If the Contracting Authority agrees that the request cannot be assessed due to bad quality of the report, the technical monitoring expert shall prepare a technical note identifying the reasons why the assessment cannot be completed and the improvements required before resubmission.

### **For all LIFE+ and LIFE 2014-2020 projects**

Monitoring experts will assess the financial and technical reports and perform a sampling of supporting documents based on ‘standard’<sup>42</sup> or ‘targeted’<sup>43</sup> checks related to the costs declared by the different beneficiaries (including affiliated entities if any) in line with the ex-ante controls defined by the Contracting Authority. The average number of beneficiaries for the different type of grants can be found in section 1.4.1.1.4 ‘Overview of grant types and numbers’. The ‘standard’ sampling is usually performed over an average of 3-5 beneficiaries per project (except for mono beneficiary grants). For the integrated projects, the ‘standard’ sampling will often concern more than 10 beneficiaries, however, it is very likely that most ‘standard’ checks have already been carried out during the previous reporting period(s) and that most ex-ante checks will concern ‘targeted’ checks related to issues encountered during previous assessment periods.

For projects only subject to further pre-financing<sup>44</sup>, the list of documents to sample for the next monitoring visit or final report, will be included in the Monitoring experts’ assessment of the mid-term report. The supporting documents will then be submitted by the beneficiaries either before or at the time of the next project visit or at the time of the final report. The assessment of the supporting documents will be carried out at the next project visit or before finalising the assessment of the technical and financial reports.

For projects with interim payments and for all projects at final payment stage, the sampling and assessment of the related supporting documents must be completed before finalising the assessment of the corresponding financial and technical reports. The Financial Monitoring experts will provide their findings, such as the detection of ineligible costs or the need for additional sampling for the next reporting period, in the monitoring expert’s report.

Before Monitoring experts complete their assessment of the reports and supporting documents, they will often<sup>45</sup> identify the need for requesting additional information. They shall provide the

---

<sup>42</sup> Standard checks consist of a pre-defined set of checks carried out on each beneficiary/affiliated entity that meets the sampling threshold.

<sup>43</sup> Targeted checks are checks that are triggered by the outcome of standard checks or issues detected during project visits or the assessment of financial/technical reports

<sup>44</sup> Further pre-financings payments are payments that are not subject to the approval of eligible costs but rather aim at providing beneficiaries with a float to enable them to continue the implementation of the project. The pre-financing remains the property of the EU until the final payment.

<sup>45</sup> About 75% of all final payment requests involve at least one request for additional information (applicable to final payments of all grants, also 2021-2027 ones).

elements enabling the Contracting Authority to request such additional information from the beneficiaries. The outcome of the assessment, such as detection of ineligible costs or irregularities and any proposal to reduce the grant, shall be reflected in the Monitoring experts' assessment report.

The Financial Monitoring expert will also fill a "payment calculation table" for all projects subject to an interim or final payment. The completion of this table will consist of:

- a. Per beneficiary: the amounts declared per cost category, the proposed corrections to the declared costs (incl. comments), possibly the amounts already accepted during a previous interim or final payment, the income declared, the compliance with the 2% rule (specific calculation for public entities only) as well as an indication if a financial guarantee is available and a certificate on financial statement had been delivered.
- b. Per project (summary sheet): the contractual budget per cost category and the new budget further to budget shifts (in line with the contractual flexibility)
- c. Per project (payment sheet): the total eligible costs, the EU contribution (value and %), the pre-financing(s) paid (or any other payments already made)

For integrated projects, the Financial Monitoring expert shall also prepare, for the final reporting, an overview table (template provided by Contracting Authority) with the total eligible costs accepted by the Contracting Authority during the previous reporting periods, to allow the beneficiaries to complete and submit it this with their final report.

When needed, LIFE project beneficiaries will inform the Contracting Authority of their intention to request modifications to their Grant Agreement. In case of complex amendments, the Contracting Authority may request the support of the monitoring experts for the assessment of the request of modifications.

The scope of the assessment of amendment requests submitted to the Contracting Authority can be seen in the standard models for such assessment, available in Annex 7– Relevant information for tenderers.

Before the assessment of an amendment request is completed, the monitoring experts may identify the need to request additional or corrected information, once or several times. They shall provide the elements enabling the Contracting Authority to request such information from the beneficiaries. The outcome of the assessment shall be reflected in the monitoring experts' assessment report.

The Contracting Authority may request the Technical Monitoring expert to assess the content of the draft amendment text.

The Contracting Authority may request the Technical Monitoring expert to assess requests of termination or suspension submitted by the beneficiaries. They will present their assessment in a Technical note.

### **For LIFE 2021-2027 grants**

Monitoring experts will assess the financial and technical reports and perform a sampling of supporting documents based on 'standard' or 'targeted' checks related to the costs declared by the different beneficiaries (including affiliated entities if any) in line with the ex-ante controls defined by the Contracting Authority. The average number of beneficiaries for the different

type of grants can be found in section 1.4.1.1.4 'Overview of grant types and numbers'. The 'standard' sampling is usually performed over an average of 3-5 beneficiaries per project (except for mono beneficiary grants). For the strategic projects, the 'standard' sampling will often concern 8-10 beneficiaries per reporting period (as standard checks may be spread out over different interim periods if needed).

For projects subject to further pre-financing payments, the sampling of supporting documents is carried out by the Contracting Authority. On the basis of these documents, the Monitoring experts will perform their assessment.

For projects with interim payments and for all grants at the time of the final payment, sampling and assessment of the related supporting documents must be completed before finalising the assessment of the corresponding financial and technical reports. At interim reporting stage, the sampling for carrying out 'standard checks' in the case of grants with a high number of beneficiaries may be spread across the different interim reporting periods. The Financial Monitoring experts shall provide their findings in the monitoring expert's report, including the detection of ineligible costs or the need for further sampling for the next reporting period.

At the interim payment and the final report stage, Monitoring experts shall assess the technical and financial reports, including the report on the use of resources containing the highest costs incurred under the subcontracting and purchase costs categories, as well as the supporting documents submitted in the context of standard and targeted checks. Before the assessment of the reports is completed, the Monitoring experts may identify the need to request additional information. They shall provide the elements enabling the Contracting Authority to request such information from the beneficiaries. The outcome of the assessment, such as detection of ineligible costs or irregularities or a proposal to reduce the grant, shall be reflected in the Monitoring experts' assessment report.

The Monitoring experts will perform their assessments as specified above. Templates of financial statements and use of resources table can be found under the LIFE programme Reference Documents in the [Funding & Tenders portal website](#). A Termination Assessment (TERA) is triggered whenever a partner (beneficiary or affiliated entity) is terminated from a grant. In this case, the terminated partner must submit a report providing the information needed to assess its contribution to the grant and the costs incurred. Upon request from the Contracting Authority, the monitoring experts shall support such assessments. Before monitoring experts complete their assessment of the reports and supporting documents, they will often identify the need for requesting additional information. They shall provide the elements enabling the Contracting Authority to request such additional information from the beneficiaries. The outcome of the assessment, such as detection of ineligible costs or irregularities and any proposal to reduce the grant, shall be reflected in the Monitoring experts' assessment report.

#### **For LIFE 2021-2027 projects where only financial monitoring tasks may be requested**

If such support is requested, the Financial Monitoring experts shall assess the budgetary part of the technical report, the financial reports, including the report on the use of resources that indicates the highest costs incurred under the subcontracting and purchase costs categories, and the supporting documents submitted for the standard and targeted checks carried out in line with the ex-ante controls established by the Contracting Authority. Before the assessment of the financial reports is completed, the Monitoring experts may establish the need for requesting additional information. They shall provide the elements enabling the Contracting Authority to request such information from the beneficiaries.

The outcome of the assessment, such as detection of ineligible costs or irregularities and any proposal to reduce the grant, shall be reflected in the Monitoring experts' assessment report. Usually, the supporting documents in the context of 'standard checks' to be performed at payment stage, are received for an average 3-5 beneficiaries per project.

This is the only sub-task under task 2.1 that applies to LIFE CET CSA grants.

#### **For the LIFE 2021-2027 operating grants and TA-PP**

Monitoring experts shall perform the technical and financial assessment of the final reports. Before monitoring experts complete their assessment of the reports and supporting documents, they will often identify the need for requesting additional information. They shall provide the elements enabling the Contracting Authority to request such additional information from the beneficiaries. The outcome of the assessment, such as detection of ineligible costs or irregularities and any proposal to reduce the grant, shall be reflected in the Monitoring experts' assessment report.

For operating grants, the costs to be checked only concern the personnel cost category.

#### **For the LIFE 2014-2020 integrated projects, and 2021-2027 strategic projects and BEST projects**

Monitoring experts shall review the draft versions, including deliverables, of interim and final reports for LIFE Integrated, Strategic and BEST projects, prior to their official submission. The review of the draft report shall be sufficiently detailed to permit completeness, clarity, compliance with templates and instructions, coherence of information provided, and to enable feedback to be sent by email to the project beneficiaries on the improvements to be made before official submission, to avoid rejection of the report or the need for several rounds of clarification after submission. The technical monitor shall inform the project beneficiaries at least 3 months before an interim or final report is due, requesting them to submit a draft for this review.

#### **For ALL grants where technical and financial monitoring tasks are requested**

The technical monitoring experts shall also assess grants' input to the development and implementation of EU policies, identify the most promising grants and highlight policy bottlenecks that may hinder grant success, replication or upscaling. The outcome of this assessment shall be included in the report. It will be used in the thematic work carried out under Services 1 and 3 to update and provide feedback to the Contracting Authority, on relevant grant results and outcomes in their specific thematic area, in a format suitable for policy feedback.

During their assessment, whether by desk review or during project visit, the Monitoring experts shall verify that the grant beneficiaries, including NGOs receiving operating grants:

- implement the actions, work packages or annual work programme and meet the objectives indicated in the grant agreements and the Contracting Authority' decisions, and any related supplementary agreement or additional clause;
- have adequate systems in place and provide reliable reporting in accordance with the provisions of the grant agreement and the ex-ante controls defined for the programme;
- correctly apply the administrative and financial rules set out in the grant agreements, including, on the basis of supporting documents provided by the beneficiaries in relation to the costs declared in the financial statements, to ensure costs eligibility.

In case a project visit is performed jointly with the Contracting Authority's staff, the Monitoring expert(s) shall, upon request, organise a preparatory meeting with the Contracting Authority's staff and submit a briefing note. This briefing note shall include a summary of the preparatory meeting, a brief overview of the project actions, work packages or annual work programme, the issues to be discussed, including financial issues, and a list of points for the Contracting Authority to convey to the project coordinator before the visit. It shall be finalised and submitted to the Contracting Authority at least two weeks before the expected date of the visit.

During the project visit of Close-to-Market projects the Technical Monitoring expert shall remind the beneficiaries of the need to complete and, when necessary, update the relevant information on the project's market-related results and to complete the survey (C2M checklist) linked to the Close-to-Market initiative. For mapping purposes, that checklist must be completed by the beneficiaries both at the start and at the end of the project.

In addition, in order to inform the Contracting Authority and the contractor's communication team, the technical monitoring experts shall flag and provide a brief summary of upcoming or recently achieved milestones of ongoing grants that have strong communication potential, namely major grant milestones which:

- demonstrate concrete results of EU funding giving support to the implementation or further development of EU policy priorities, for example a pilot installation of an innovative environmental technology or successful conservation efforts leading to eco-tourism opportunities generating green jobs and growth,
- have the potential to tell a compelling human-centred story, for example the story of a person directly benefitting from a LIFE grant, and
- show a strong EU added value, for example cross-border cooperation.

The Contracting Authority's staff may request the technical and/or financial monitoring experts to participate in meetings with beneficiaries or to conduct additional assessments on specific implementation issues (e.g. to clarify subcontracting (going to be) carried within the project implementation, to pre-empt non-compliance with LIFE rules and subsequent costs ineligibility). The Monitoring experts shall prepare on such occasions, and if requested by the Contracting Authority, a technical note presenting their assessment of the issues concerned, their findings and the meetings main outcomes.

The technical monitoring experts may be requested to participate in the platform events organised by the Contracting Authority (see Service 3 task 3.3) when a project or operating grant they are monitoring is invited.

For all grants, at the stage of submission of the final report, the technical monitoring experts will include in their assessment the elements necessary to update the project summary contained in the LIFE Public Database<sup>46</sup>.

### **Land purchase database (LPD)**

For the relevant projects (vast majority being projects under the Nature & Biodiversity Sub-programme), the Technical Monitoring expert shall validate the data submitted by the beneficiaries of the projects assigned to that expert and shall guide the project beneficiaries on

---

<sup>46</sup> The update of the LIFE public Database is done in cooperation with the contractor's communications team.

any queries they may have regarding the entry of their spatial data into the Land Purchase Database at the closing of the project.

The information gathered in the LPD (section 1.4.1.2.5) for all **parcels** whose purchase was co-financed with LIFE funds is the following:

- Land register number, Name of the parcel (when it exists), Land use status of the parcel at the moment in which the parcel was purchased; legal area as reported in the land register data; Name of the organisation or person that is responsible for the management activities on the purchased parcel, name of the Municipality where it is located.

For all the **purchases** (one purchase might include a number of parcels) the following elements are mandatory:

- Number of parcels in that purchase; Name of the purchase and Notarial act number (usually are the same); notarial act date; Document where the nature conservation clause is included (this is the clause establishing the that the purchased land will be indefinitely used for nature conservation purposes); total cost and amount of EU co-funding

The beneficiary uploads in the LPD the shapefiles of the purchased plots and the most relevant documents (such as the notary deed).

In addition and upon specific request from the Contracting Authority, the contractor shall carry out detailed analysis to assess the current use of the land purchased under LIFE projects and identify potentially problematic plots (“red plots”) where the current land use is not compatible with the goals defined in the project benefiting from the LIFE programme funding. In the course of that assignment, the technical monitoring experts shall retrieve and enter the land purchase data provided from the beneficiaries of those closed projects for which data is still missing. The workload will be defined in the specific requests for services.

For each monitoring task listed above, the tenderers shall describe how they propose to perform the task. The offer shall present the role of the different actors involved whether internal to the contractor team or external. To illustrate the implication of the different members of the External Monitoring team, the offer shall refer to the provided templates to be used by the Monitoring team and models of grant agreements.

In addition, the tenderer will explain the quality control that is foreseen at the task level to ensure a qualitative, reliable, and timely delivery.

For the relevant tasks, the tenderers will detail how they will ensure at the task level the coordination between technical monitors, communication experts and close-to-market experts.

In addition, the tenderers shall describe:

- how, at the first project visit, they will check the beneficiaries’ set up with regards to reporting, accounting, and time registration system for the project for the project in line with the grant agreement provisions.
- how they will ensure the collection of the elements necessary for the update of the project’s public summary.

The subtasks to be performed under task 2.1 will be paid as follows (see Annex 6 – Financial offer form):

- Financial assessment of reports linked to LIFE CET CSA projects within task 2.1: fixed rate per the task actually performed;
- Fixed annual lump sum per open grant to cover the rest of tasks under task 2.1 .
  - The contractor shall take as a reference for the estimate the tables with indicative workload linked to task 2.1 listed below.
  - This estimate shall also cover:
    1. the three working days per year per open grant per 12-month period for addressing issues raised by coordinating beneficiaries outside project visits;
    2. the 0.75 working days per open grant per 12-month period for ad hoc support requested by the Contracting Authority’s staff.
  - Where the duration of performance is shorter or longer than 12 months, remuneration shall be adjusted in proportion to the actual duration.

**The number of open grants for a given service contract will be defined by a list provided annually by the Contracting Authority on the second half of January.**

**Tables with indicative workload linked to task 2.1 during four years**

Assessment of reports and payment requests, ex-ante controls and/or analysis technical issues for LIFE+ and LIFE 2014-2020 Programme

Tasks	Estimated workload per unit output in working days (wd)	Deadline to submit the output	Indicative numbers of tasks likely to be requested (for 4 years)	Output expected
<b>Action Grants</b>				
a. Technical and financial assessment of a Midterm Report Projects: Traditional and PRE	5.5 wd	15 calendar days  7 additional calendar days in case additional information is requested	10	Monitoring report presenting both technical and financial assessment (including sampling and ex-ante controls) with the key points.
b. Technical and financial assessment of Interim and Final Report Integrated Projects	10.5 wd		70	For interim (integrated projects)/final report a payment calculation table should be filled. In the course of the assessment, additional information to payment

c. Technical and financial assessment of Final Reports Projects: Traditional and PRE	8.5 wd		150	<p>requests may be requested by the Contracting Authority. It is expected that around 75% of final payment request may generate assessment of additional information/supporting documents.</p> <p>The Monitoring experts will have an additional deadline of 5 calendar days to perform the assessment and submit their monitoring report providing their opinion on each point.</p> <p>Updated project file.</p>
d. Technical assessment of a Midterm Report Projects: Traditional and PRE	3.5 wd	15 calendar days	0	<p>Assessment report presenting only technical with a list of key points.</p>
e. Technical assessment of Interim and Final Report Integrated Projects	6.5 wd	7 additional calendar days in case additional information is requested	0	<p>In the course of the assessment, additional information to payment requests may be requested by the Contracting Authority. The Monitoring experts will have an additional deadline of 5 calendar days to perform the assessment.</p>
f. Technical assessment of Final Reports Projects: Traditional and PRE	4.5 wd		0	<p>Updated project file</p>
g. Assessment of additional documents following a contradictory procedure	2 wd	15 calendar days	20	<p>Monitoring report presenting the assessment with the list of key points.</p> <p>A payment calculation table should be filled.</p>
h. Assessment of progress report Projects: Traditional and PRE	1 wd	15 calendar days	10	<p>Monitoring report presenting technical assessment with a list of key points for the consideration of the Contracting Authority</p>

Assessment of reports and payment requests, ex-ante controls and/or analysis technical issues for LIFE 2021-2027 Programme

Tasks	Estimated workload per unit	Deadline to submit	Indicative numbers of tasks	Outputs expected
-------	-----------------------------	--------------------	-----------------------------	------------------

	<b>output in working days (wd)</b>	<b>the output</b>	<b>likely to be requested (for 4 years)</b>	
<b>Action Grant</b>				
a. Pre-check of IR & FR reports Projects: IP/STRAT/BEST	2 wd	15 calendar days	40	Email sent to the project coordinator with feedback on aspects to improve prior to official submission of report  This applies also to LIFE 2014-2020 IP projects
b. Assessment of an Additional prefinancing Report Projects : SAP, TA CAP, TA-R and TA PLP	5.5 wd	15 calendar days	450	Monitoring report presenting both technical and financial assessment (including sampling and ex-ante controls) with the key points.  In the course of the assessment, additional information to payment requests may be requested by the Contracting Authority.  The Monitoring experts will have an additional deadline of 5 calendar days to perform the assessment. It is expected that around 75% of final payment request may generate additional assessment.  Updated project file.
c. Assessment of Final Report Projects : SAP, TA CAP, TA-R and TA PLP	8.5 wd		470	
d. Assessment of Periodic and Final Report Projects: STRAT, BEST	10.5 wd		65	
e. Assessment of Final Report Projects: TA PP	2 wd		7 additional calendar days in case additional information is requested	

f. Technical Assessment of an Additional prefinancing Report Projects : SAP, TA CAP, TA-R and TA PLP	3.5 wd		0	NB: in the course of the assessment, additional information to payment requests may be requested by the Contracting Authority. The Monitoring experts will have 5 additional calendar days to perform the assessment.  Updated project file.
g. Technical Assessment of Final Report Projects : SAP, TA CAP, TA-R and TA PLP	4.5 wd		0	
h. Technical Assessment of Periodic and Final Report Projects: STRAT, BEST	6.5 wd		0	
i. Assessment of additional documents following a contradictory procedure	2 wd	15 calendar days	120	Monitoring report presenting the assessment with the list of key points.  For the case of appeals following the termination of a beneficiary, the estimated workload is 1 wd
j. Assessment of final report of a terminated partner Projects : SAP, TA CAP, TA-R and TA PLP	4 wd	15 calendar days  7 additional calendar days in case additional information is requested	100	Monitoring report presenting both technical and financial assessment (including sampling and ex-ante controls) with the key points.  In the course of the assessment, additional information to payment requests may be requested by the Contracting Authority.
k. Assessment of final report of a terminated partner Projects : STRAT, BEST	5 wd		20	The Monitoring experts will have an additional deadline of 5 calendar days to perform the assessment. It is expected that around 75% of final payment request may generate additional assessment.  Updated project file.
<b>Operating grants</b>				
l. Assessment of an Additional prefinancing report	3 wd	15 calendar days  7 additional calendar days in case	6	Monitoring report presenting both technical and financial assessment (including sampling and ex-ante controls) with the key points. It is expected that in the course of the assessment,

		additional information is requested		additional information to payment requests will be requested by the Contracting Authority.
m. Assessment of final report	7 wd	30 calendar days  7 additional calendar days in case additional information is requested	70	Monitoring report presenting both technical and financial assessment (including sampling and ex-ante controls) with the key points. It is expected that in the course of the assessment, additional information to payment requests will be requested by the Contracting Authority.
<b>Stand-alone financial monitoring</b>				
n. Financial assessment of reports (incl. Ex-ante checks of supporting documents)  <b>Note: this is the only subtask under task 2.1 that applies to LIFE CET CSA grants, and is listed in Annex 6 (Financial Offer) as 2.1.f</b>	2.5 wd	15 calendar days  7 additional calendar days in case additional information is requested	30	Monitoring report presenting both financial assessment (including ex-ante controls further to sampling) and assessment of additional information with the key points.

#### Project visits and meetings

<b>Tasks</b>	<b>Estimated workload per unit output in working days (wd)</b>	<b>Deadline to submit the assessment</b>	<b>Indicative numbers of tasks likely to be requested (for 4 years)</b>	<b>Outputs expected</b>
<b>All grants except LIFE CET CSA</b>				
a.1 Physical project visit to grants other than IP/STRAT/BEST, and other than Nature & Biodiversity projects	6.5 wd	21 calendar days	1035	Visit report covering both technical and financial parts with the key points.  Updated project file.

a.2 Physical project visit to Nature & Biodiversity projects (traditional, SAP, PLP & TA-R)	7.5 wd		420	
a.3 Physical project visit to IP/STRAT/BEST projects	8.5 wd		160	
b.1 Project virtual visit to projects/operating grants other than IP/STRAT/BEST	4.5 wd		280	
b.2 Project virtual visit to IP/STRAT/BEST projects (includes financial monitor too for financial discussions)	6.5 wd		20	
c. Project joint visit preparation	0.5 wd	15 days before the project visit	600	Briefing note and upon request preparatory meeting with the Contracting Authority staff that will join the project visit.
d. Ad hoc meeting with project	1 wd	5 calendar days after the meeting date	270	Pre-meeting with Contracting Authority staff if necessary  Technical note presenting main conclusions including when relevant key points

Other monitoring tasks e.g. assessment of amendment request

<b>Task</b>	<b>Estimated workload per unit in working days (wd)</b>	<b>Deadline to submit the assessment</b>	<b>Indicative numbers of tasks likely to be requested (for 4 years)</b>	<b>Output expected</b>
a. Assessment of amendment request All grants types except IP,	3.5 wd	15 calendar days	670	Assessment of officially submitted amendment request.

STRAT, BEST and CSA				
b. Assessment of amendment request IP, STRAT & BEST	5.5 wd	15 calendar days	80	Assessment of officially submitted amendment request
c. Technical note All grants types except LIFE CET CSA	2 wd	The deadline will depend on the assessment	290	Technical note presenting expert's opinion on grant specific implementation issues or additional analysis. The note will include when relevant, key points for the Contracting Authority consideration.
d. Validating LPD data and guiding beneficiaries	2 wd	At the final payment stage	100	Land Purchase Database completed
e. First version of project file	2 wd 4 wd	SAP, PLP, TA-R STRAT, BEST	200 16	Preparation of first version of project file at project start
f. Contact twice a year with projects	0.4 wd 0.8 wd  1 wd 2 wd	SAP, PLP, TA-R (projects with no big issues 0.4 wd, while those with complex issues 0.8 wd)  IP/STRAT/BEST (projects with no big issues 1 wd, while those with complex issues 2 wd)	1800 200  200 60	This involves the planning of contacts with pre-approval from Contracting Authority of which are considered to have complex issues, the contacts, and the follow-up (default email for projects with no big issues and technical note for projects with big issues, plus potential discussion with Contracting Authority staff)

## Task 2.2 Ex-post monitoring project visits

The Contracting Authority will provide all the necessary information to the contractor to select the ex-post monitoring visits and to perform them.

Monitoring experts shall be assigned to the projects selected to be visited for ex-post monitoring visits and shall be responsible for organising the visits with the beneficiaries. The visits shall be carried out physically. The Contracting Authority may decide to participate in some ex-post visits, up to five per year. In those cases, relevant staff from the contractor (Thematic Support Team overseeing the organisation and delivery of the ex-post monitoring visits, plus technical monitors carrying them out, unless agreed otherwise with the Contracting Authority) shall hold a virtual preparatory meeting with the Contracting Authority at least two weeks before the joint visits.

The Monitoring experts shall request the project beneficiaries to provide updated information, namely on whether the project is still operational and on the extent to which the proposed solution has been continued, upscaled, replicated and the reasons linked to the post-project failure or success. After each ex-post visit, the Monitoring experts shall prepare an individual report including key elements, using the templates agreed with the Contracting Authority. For LIFE+ and LIFE 2014-2020 projects, the ex-post monitoring visit report shall be uploaded in 'Butler'. Where relevant, the Monitoring expert shall also update the online LIFE LPI webtool.

It is expected that the Contracting Authority will request around 20 ex-post monitoring visits per year, most of them within the EU, and in rare occasions to countries associated to the LIFE Programme ([participating countries](#)).

In rare occasions, the technical monitoring experts will be requested to undertake individual ex-post monitoring visits on closed projects (besides those described above). It is estimated that around 5 physical visits of this kind shall be carried out in total during the Framework contract, and none virtually. They will be paid at the same rate as the other ex post monitoring visits within this task.

Tenderers shall present an illustrative case based on a specific theme of their choice, duly justified, and the related list of questions guiding the ex-post monitoring visit. The purpose shall be to verify the sustainability of the project actions and results, the long-term impact in view of the original project scope, the actual dissemination of knowledge acquired, and the replication of the solution proposed.

The tasks to be performed under Task 2.2 will be paid with a lump sum per project visited.

**Table with indicative workload linked to task 2.2 for four years:**

<b>Task</b>	<b>Estimated workload per unit in working days (wd)</b>	<b>Deadline to submit the assessment</b>	<b>Indicative numbers of tasks likely to be requested (for 4 years)</b>	<b>Output expected</b>
Ex-post monitoring visit: preparation, participation, the reporting and the LPI update.	15 wd	30 calendar days after the project visit	80	Visit report per visit presenting the specific project finding as well as (i) a list of key points; (ii) list of modification to be brought to the project summary and update of the LPI webtool (if relevant)

**Task 2.3 Participating in Welcome Meetings**

The technical monitoring experts assigned to the newly selected projects shall contribute to the preparation of the events by preparing a Project Initial Document. This document is the first output prepared by the Monitoring experts and is based on a desk review of the project description of action.

The document summarises the project objectives and expected results as well as the project specific key elements aiming towards sustainability of project results and contribution to the development of implementation of EU policies. It will contain also potential questions that may

be asked during the welcome meetings thematic sessions, as well as a list of LIFE funded, and potentially other projects with which networking is suggested.

The technical monitoring experts shall review the presentations prepared by the project coordinators of the newly selected projects and provide feedback to ensure alignment with the criteria set for such presentations by the Contracting Authority, e.g. maximum duration, templates to use, visibility rules to follow. Such criteria will be communicated to the Contractor at least 2 months in advance of the Welcome Meeting.

The technical monitoring experts assigned to newly selected projects must participate in the relevant thematic session when requested to do so.

In addition, within this task the technical monitoring experts will prepare the draft information that will serve as input for the preparation of the initial web summary of each new project (task 4.2.2.b). Examples of project web summaries can be found in the [LIFE Public database](#).

Two Welcome Meetings for standard action projects (SAP) in the Autumn of 2027 and 2028 are expected to take place, with around 130 to 150 projects each, and two Welcome Meetings for strategic projects (STRAT) in the first quarter of 2028 and 2029 are expected to take place, with around 8-15 projects each. See further information on logistics of these events in tasks 4.5.3.a and 4.5.3.b.

The tasks to be performed under Task 2.3 will be paid with a lump sum per new project participating in the corresponding Welcome Meeting.

**Table with indicative workload linked to task 2.3 for four years:**

<b>Task</b>	<b>Estimated workload per unit output in working days (wd)</b>	<b>Deadline to submit the assessment</b>	<b>Indicative numbers of tasks likely to be requested (for 4 years)</b>	<b>Outputs expected</b>
Input and participation with Welcoming meetings for the newly selected projects	3 wd	30 days before the Welcome meetings	300	Project Initial Document  Draft initial project web summary (in the case of the SAP Welcome Meeting, not only for new SAP projects, but also for new TA PLP projects)

#### **1.4.2.2.3. Service 3: Thematic support to LIFE Project Indicators (LPI), Close-to-Market projects and policy-related events, briefs and studies**

Under this service, the contractor shall provide thematic support to enhance the LIFE programme implementation, including on LPIs, policy feedback, support to close-to-market projects and project monitoring. The tasks are to be performed by technical experts that are selected among the Monitoring experts' team for their specific expertise.

##### **Task 3.1 – LIFE Project Indicators (LPI) and processing of projects' data**

The contractor shall support the inclusion and review of data in the LIFE Project Indicators (LPI) database<sup>47</sup> web tool. The services under this task shall be provided and priced in accordance with the sub-tasks set out in the Financial Offer form.

For grants other than PRE, TA-PLP, NGO and CAP grants, the contractor shall support the inclusion of indicators in the KPI web tool at the following stages:

initial snapshot, corresponding to sub-tasks 3.1.a and 3.1.b;

interim or final snapshot, corresponding to sub-tasks 3.1.c and 3.1.d.

The contractor shall review the data included in the proposal and will confirm, modify or further justify them in consultation with the project beneficiaries and make sure these data are correctly entered into the database. The contractor shall provide the projects beneficiaries with an extract of the data entered in the LPI web-tool and obtain their confirmation before enabling reporting at the relevant stage.

For LIFE+ projects, corresponding to sub-task 3.1.e, the contractor shall collect from the beneficiary of every closing project the information necessary for producing indicators and will include those indicators into the Project Indicators (LPI) database.

For the LIFE 2014-2020 and LIFE 2021-2027 projects, beneficiaries are requested to report via the LPI Webtool<sup>48</sup> at two stages. Firstly within the first nine months from the start of the project start and secondly at the final report stage. In the case of strategic projects, a third interim-stage LPI report is requested via the LPI webtool. Beneficiaries of closed projects may also be requested to report on their indicators 3 or 5 years after the project closure (ex-post reporting).

At all stages, the contractor shall assess the data inserted in the LPI database by the beneficiaries, including the baseline and the expected results, and provide guidance when required. The contractor shall verify the methodology used by the beneficiaries for estimating baseline and expected results before their submission to the Contracting Authority and declare that “the expected results are reasonable and can be reached in the defined timeframes”. At final

---

<sup>47</sup> More information on the content of the LIFE Project Indicator database is provided under the LIFE website at the page [https://cinea.ec.europa.eu/life/life-reporting\\_en#ecl-inpage-1072](https://cinea.ec.europa.eu/life/life-reporting_en#ecl-inpage-1072). The contractor should note that the LPI database may be subject to revision.

<sup>48</sup> Guidance on the LPI webtool is available [https://cinea.ec.europa.eu/programmes/life/life-reporting\\_en#key-project-level-indicators-LPIs](https://cinea.ec.europa.eu/programmes/life/life-reporting_en#key-project-level-indicators-LPIs)

stage, the contractor shall also provide a comparison between the predicted or expected impacts and those that were actually achieved.

For LIFE projects financed from Call 2021 onwards, corresponding to sub-task 3.1.f, the contractor may be requested, to review and ensure alignment with actual final project results of two GIS data files<sup>49</sup> per project, namely the location and impact file, prepared by the project beneficiaries at project end.

Experience has shown that it is effective and efficient to have a limited number of technical monitoring experts specialised in this task, centralising to some extent the LPI support to beneficiaries within the monitoring team.

Tenderers shall describe how they will ensure an efficient mechanism to perform efficiently the LPI tasks described above. In particular they shall describe how they will perform the assessment of the baseline data and expected results provided by the beneficiaries at the different LPI reporting stages mentioned above.

**Indicative workload of task 3.1 during four years:**

<b>Task</b>	<b>Estimated workload per unit in working days (wd)</b>	<b>Deadline to submit the output</b>	<b>Indicative number of tasks likely to be requested for 4 years</b>	<b>Outputs expected</b>
a. Support to include indicators in the LPI webtool - initial snapshot All grants except PRE, TA-PLP, NGO, CAP, STRAT, BEST	2 wd	Deadline 9 months after the project start date.	500	Snapshot to be validated by the Contracting Authority
b. Support to include indicators in the LPI webtool - initial snapshot STRAT, BEST	3 wd	Deadline 9 months after the project start date.	16	
c. Support to include indicators in the LPI webtool – final snapshot All grants except PRE, TA-PLP, NGO, CAP, IP, STRAT, BEST	2 wd	The latest when submitting the final payment assessment report	630	

<sup>49</sup> Specific format still to be defined (e.g. GeoJSON text: <https://geojson.io/> )

d. Support to include indicators in the LPI webtool – interim/final snapshot IP, STRAT, BEST	3.5 wd	The latest when submitting the interim/final payment assessment report	130	
c. Inclusion of LIFE+ closing in the LPI Database	2 wd	At the final payment request stage	3	
d. Support to include 2 GIS data files (location & impact) in corresponding database  All grants	0.5 wd	21 days after the files are provided by the project beneficiaries	540	GIS data files to be validated by the Contracting Authority

### Task 3.2 – Support to close-to-market (C2M) projects

Since the LIFE2014 call for proposals, the Contracting Authority has been encouraging applicants to submit close-to-market projects. Those projects aim at achieving both environmental or climate and economic impacts. They deliver improved environmental and climate solutions capable of being widely taken up by the society in general and the economy in particular<sup>50</sup>. The close-to-market projects should achieve these impacts by accessing markets with their products, services or technologies. The contractor shall also support ongoing projects to achieve the best possible results, and propose and guarantee the implementation of useful services, either within this framework contract or by exploiting existing services.

For the services to be performed under Task 3.2, tenderers shall submit one daily rate for each of the three C2M expert profiles (see profiles B10, B11 and B18 under section 3.2.3), as set out in the Financial Offer form (C2M senior expert, C2M junior expert, and C2M senior coach). The indicative yearly numbers of projects, requests, sessions and other activities described below are provided solely to indicate the expected scope and workload of the task, and do not constitute separately priced items.

**The indicative workload for four years linked to the implementation of task 3.2 is the following:**

Profile	Workload for 4 years in working days	Description of profile
C2M senior expert	1320	5+ y of relevant experience in business model/plan analysis, project financing, business modelling, and/or financial risk management
C2M junior expert	600	Responsible for the administrative aspects of the C2M Tasks (such as monitoring the functional mailbox for the C2M helpdesk, conducting searches and updates

<sup>50</sup> From LIFE2016 onward, the guidance for applicants of relevant Calls was adapted to guide the potential applicants. In particular, applicants for this type of projects are invited to include in their proposal a thorough description of the specific key features such as technical readiness, technical process and state of the art, scale and output of the project, market positioning, supply chain, competitors and economic feasibility.

		in the C2M database, sending follow-up reminders regarding C2M/IR questionnaires etc.)
C2M senior coach	480	8+ years of relevant professional experience in business coaching and mentoring and/or connecting businesses and investors and facilitating investment deals

Services provided by the contractor to the Contracting Authority and the beneficiaries of LIFE close-to-market projects shall include:

- **Mapping, identification and analysis of LIFE projects:** Identification, classification and analysis of new and ongoing LIFE projects relevant to market uptake, innovation, and circular economy objectives. This task includes identifying promising projects and supporting their progress towards market readiness through targeted follow-up and support measures. The indicative yearly number of projects analysed and followed under this task is currently between 50 and 70.

**Key outputs:**

- Expansion and development of the LIFE C2M database via inclusion of new projects and any updates related to ongoing or closed projects to ensure complete and comprehensive data related to all C2M projects;
  - Integration of the existing database into MS Teams of CINEA as a Teams-integrated web database with a user-friendly interface;
  - Updated C2M checklists; state of play reports on validation of C2M checklists and summary overview;
  - Reports based on project research requests from CINEA or/and parent DGs.
- **Helpdesk and advisory services:** on-demand support and guidance to LIFE beneficiaries on close-to-market and business-related aspects, responding to ad-hoc requests and specific cases. The helpdesk will serve as a first point of contact for beneficiaries seeking advice on C2M aspects. The indicative yearly number of projects receiving helpdesk support is estimated at around 40 projects.

**Key outputs:**

- A C2M support assistance helpdesk functional mailbox
- A method and work plan for delivering market and investment readiness support, including the proposed types of assistance that will be offered to the beneficiaries, for example support targeting different business areas, knowledge or skills in order to meet companies' individual needs such as supporting them in scaling up and the method for following up and reporting on the mid- and long-term progress of companies;
- A method and framework for management of C2M experts ensuring the provision of C2M ad-hoc support, including coach training and quality monitoring of delivered coaching services;

- Delivering of ad-hoc C2M support in response to approximately 40 to 70 ad-hoc requests, with a maximum ceiling of 3 working days per project, unless otherwise agreed with CINEA).
- **Business coaching, mentoring and field guidance:** Design and delivery of tailored, individual and group coaching and mentoring services aimed at strengthening the market readiness, business models and investment attractiveness of LIFE projects. This includes remote, online and on-site visits to provide hands-on guidance to businesses, as well as facilitating access to incubation processes and, where suitable, supporting pitching to investors.

The indicative yearly volume of coaching and mentoring activities is approximately 6 to 10 group coaching sessions and 15 to 20 individual coaching sessions per year. These figures are provided as an estimate and may vary slightly depending on beneficiaries' needs and demand.

***Key outputs:***

- List of proposed projects for targeted coaching and mentoring support activities based on exploratory surveys with beneficiaries, database analysis, recommendations from TMO/PAs, and other sources;
- C2M sessions preparatory notes based on introductory or preparatory calls with the identified projects
- C2M session follow-up reports including contributions to project monitoring visit reports on C2M aspects and related action points, as well as relevant contributions for follow-up letters related to project visits;
- Follow-up actions with beneficiaries after C2M sessions, when relevant;
- Proposals for C2M group training workshops aimed to help beneficiaries to increase their market readiness, including sector or topic specific sessions designed by the contractor and involving relevant C2M experts;
- Delivery of the collective coaching C2M workshops;
- Proposals for personalised one-to-one incubation and acceleration coaching for selected beneficiaries;
- Delivery of incubation and acceleration coaching guidance for selected beneficiaries;
- Contribution to relevant reports regarding the implemented coaching and support activities including analysis of impacts and recommendations;
- Collection and analysis of project data and integration into the database.
- **Promotion, communication and capacity-building:** Activities to promote LIFE close-to-market results and success stories, for example through news bulletins, interviews with beneficiaries, news features or project handouts, as well as activities for enhancing communication on the available support services, and organising training and upskilling actions for beneficiaries, technical monitors and Contracting Authority's staff with C2M projects in their portfolio. This also includes building new links with private sector networks

and business associations to promote the LIFE Programme and increase its visibility among potential partners and investors.

- **Data collection and analysis of innovation potential:** Processing and analysis of project-related data, including through tools such as the [EU Innovation Radar](#) questionnaires and C2M checklists to assess innovation maturity, market potential and readiness levels. The analysis will feed into strategic reporting and support evidence-based decision-making for future C2M activities.

### **Task 3.3 Organising policy-related meetings and supporting participation in events**

The contractor shall support the Contracting Authority in organising a series of meetings to promote networking and exchanges between ongoing and closed LIFE grant beneficiaries – including NGOs benefiting from operating grants - and relevant stakeholders including European Commission staff.

A key objective of those meetings is to showcase best practices, gather lessons learnt and convey to policy makers strategic feedback drawn from the implementation of the grants. In particular, such meetings should leverage experience from the implementation of LIFE grants to identify governance challenges, and the key barriers to the implementation of the EU policies and plans in the areas of environment, nature and biodiversity, climate change and energy.

The type and format of these meetings may vary depending on the objectives and audience targeted. Two main types of meetings may take place (described in detail further down):

- **Physical platform meetings;**
- **Online platform meetings.**

The services to be performed under Task 3.3 shall be remunerated in accordance with the sub-tasks set out in the Financial Offer form, namely:

- Sub-task 3.3.a, covering support to the organisation of one physical platform meeting, priced per meeting. It covers the costs of external monitoring experts (preparation, implementation and post-event tasks), including travel and accommodation costs of monitoring experts attending the event, plus costs to ship materials.
- Sub-task 3.3.b, covering support to the organisation of an online platform meeting, priced per working day of monitoring expert (costs linked to support to communication and online logistics are covered under sub-task 4.5.3.f);
- Sub-task 3.3.c, covering participation in other thematic events, priced per working day of monitoring expert (costs linked to support to communication and logistics are covered under sub-task 4.5.2).

The indicative numbers of meetings, participants and preparation periods described below are provided solely to indicate the expected scope and workload of the task.

On a rolling basis, the contractor shall propose a list of future meetings. This list shall be based on an assessment of the EU policy agenda to maximise the potential use of the meetings' outcomes in policymaking.

After approval by the Contracting Authority, the contractor will prepare, organise and participate in these meetings. In particular, the contractor shall ensure that the focus of each meeting is well defined and the appropriate participants are identified and engaged.

Where relevant, the contractor shall also foresee concrete follow-up actions such as drafting policy recommendations or specific external communication activities<sup>51</sup>. In particular, the contractor will prepare an event-specific communication strategy in view of reaching out to LIFE community stakeholders including policymakers.

The contractor shall prepare a meaningful report focused on the concrete outcomes from the meeting's discussions, including possible follow-up activities.

#### **Physical platform meetings, corresponding to sub-task 3.3.a:**

- Aim to provide inputs to policy makers in order to support the planning for and implementation and update of environmental and climate policies and strategies; those meetings may involve a large audience with specific networking sessions for grant beneficiaries.
- Such meetings generally last between two to three days, and are expected to involve representatives of 10 to 50 ongoing or closed LIFE-funded projects with an indicative number of participants ranging from 50 to 100. In addition, the participation of other stakeholders should be ensured, including potential LIFE applicants and other EU-funded projects such as research projects or projects financed through the regional funds.
- They are hosted by a volunteer project or a National Contact Point. The **event's logistics are covered by the host** at their own costs, with the possible exceptions of recording videos on-site (e.g. interviews) and shipment of promotional materials, that shall be covered by the contractor as part of the lump sum price per meeting for task 3.3.a.
- However, in rare occasions (estimated up to four in the four years of the Framework contract) there is a priority to organise the event in Brussels but there is no project or National Contact Point to host. In such cases, the contractor shall provide: registration platform, shipping of materials, venue with capacity to host up to 6 simultaneous sessions, catering, badges, technical equipment such as screens, projectors (beamers), computers or laptops, lighting, audiovisual equipment, sound amplification systems, stationary equipment and flip charts, as well as fixed and mobile microphones.
- The costs linked to the event's logistics in this last case will be covered using the corresponding number of units of the lump sum price provided in Annex 6 (Financial Offer) for the item "Task 4.5.3 Other physical LIFE meetings/events"
- It is expected that the contractor will organise up to three physical platform meetings per year, and some may be organised in a hybrid format, if so decided by the Contracting Authority and the host project. To ensure a successful event, at least six months are usually needed for preparation once the topic is confirmed.

#### **Online platform meetings, corresponding to sub-task 3.3.b:**

- Aim to promote exchanges between LIFE grant beneficiaries working on a particular theme or with a specific grant type, for example integrated projects, capacity building projects, NGO OGs. Those meetings usually involve a more focused audience. However, they can be also organised as open informative events, in which case the audience might be quite large (up to a few thousand participants).

---

<sup>51</sup> Examples of potential publications post platform meetings can be found here: [https://cinea.ec.europa.eu/publications/digital-publications/marine-protected-area-management-experiences-towards-strictly-protected-areas\\_en](https://cinea.ec.europa.eu/publications/digital-publications/marine-protected-area-management-experiences-towards-strictly-protected-areas_en)

- They will be organised remotely with the support of the contractor's communication experts for logistical aspects such as setting up the virtual meeting environment and managing invitations.
- Such meetings generally last one day or two half days, and may involve between 8 to 20 ongoing or recently closed LIFE-funded projects, with an indicative number of participants ranging from 12 to 60. However, where such meetings are organised as open informative events to share, for example, best practices, participation might be much larger. It is expected that the contractor will support the organisation of up to six online platform meetings per year. To ensure a successful event, at least four months are usually needed for preparation once the topic is confirmed.

For all physical as well as online platform meetings, the contractor shall:

- Provide a detailed planning of operations, on the basis of a checklist.
- Provide an excel list of LIFE projects that would be potential candidates to invite, including contact data, including potential revised versions after feedback provided by the Contracting Authority and other EC staff participating in the event.
- Prepare a concept note and agenda, including potential revised versions after feedback provided by the Contracting Authority and other EC staff participating in the event. See template of the concept note structure in Annex 7.
- Ensure regular event-specific communication by email and phone with the Contracting Authority staff in charge of the event. This includes an initial planning meeting and regular updates on the organisation and follow-up of the event, including minutes of preparatory meetings held. The Contracting Authority may request short email updates at any time and in this case, the response time should not exceed three working days.
- Liaise with selected grant beneficiaries, event organisers and National Contact Points, following instructions by and upon agreement with the Contracting Authority, to facilitate beneficiaries' participation.
- Assist grant beneficiaries which have been selected as speakers by preparing interventions and presentations based on European Commission policy priorities.
- Manage all invitations, personalised when requested by the Contracting Authority, and registrations in accordance with EC requirements, including compliance with GDPR.
- Prepare and publish an event notice prior to the event, a post-event article, plus social media coverage (social media coverage is to be performed by the Community manager working as intra-muros, see Task 4.3.3).
- Ensure the smooth running of the event until its conclusion, including coordination and moderation of the event activities, managing any unexpected logistical (except for physical platform meetings, when the hosting is provided by a project or National Contact Point) and technical needs throughout the event.
- Launch a satisfaction survey among participants in accordance with EC requirements in view of improving the quality of future events, preparing a short summary of the results and suggesting follow up actions. The survey should be launched at the end of the event for online meetings and within one day after the end of the event, for physical ones, unless otherwise specified by the Contracting Authority.

- Send to the participants a “participants package” latest one week after the event, including presentations, publications, and other materials presented during the event.
- Organise a lessons learned meeting with the Contracting Authority, with a feedback report including lessons learned, no later than three weeks after the event.
- Prepare a final report, including social media statistics and analysis, using Contracting Authority's KPIs to assess success at reaching targets. The draft final report of the event shall be delivered to the Contracting Authority no later than one month after the event, and the final version after receiving the Contracting Authority’s feedback shall be delivered within 2 weeks. See template of the final report structure in Annex 7

**Under sub-task 3.3.c** and upon request from the Contracting Authority, the contractor may be required to **participate in other events** organised in the EU or third countries associated to LIFE by LIFE-funded projects such as Inter-LIFE meetings<sup>52</sup> or third parties such as Pollutec or Green Transition Forum. Generally, those meetings last between two to four days. The tasks to be performed by the monitoring experts in relation to such events shall be pre-discussed for each of such events, and typically involves supporting the definition of the event’s concept note and agenda (only for events organised by LIFE-funded projects), the list of projects, liaison with participants, speakers and the event organisers (if not done by the communication team as part of task 4.5.2), attendance to the event and reporting latest one month after the event. For events organised by LIFE-funded projects, logistics costs include shipment of promotional materials and costs linked to the attendance of the monitoring experts to the event (for example travel and accomodation) that shall be covered by the contractor as part of the daily fee for task 3.3.c.

For events organised by third parties:

- Costs linked to the attendance of the monitoring experts to the event (for example travel and accomodation) shall be covered by the contractor as part of the daily fee for task 3.3.c.
- Other logistics costs shall be covered using the corresponding lump sum price provided in Annex 6 (Financial Offer) for the most appropriate item(s) among those listed for task 4.5.2.

The average workload linked to events under sub-task 3.3.c is 15 working days per event.

Tenderers shall describe the main methodological steps for organising a physical platform meeting and an online platform meeting. To illustrate their offer, the tenderers shall choose a thematic area and present an example based on that choice.

---

<sup>52</sup> **InterLIFE national/regional meetings** are hosted by a volunteer project. The event’s logistics are covered by the host at their own costs and last 2-3 days, with similar number of participants and LIFE projects as for physical platform meetings. In these meetings the projects belong to the same country or to a set of countries sharing similar issues, mostly with no participation of projects other than LIFE, and always include a substantial component linked to sharing best practices and clarify (technical, reporting, financial, administrative) aspects linked to LIFE projects implementation, having active participation of relevant LIFE National Contact Points. To ensure a successful event, at least 5 months are needed for preparation.

**Indicative workload of monitoring experts linked to task 3.3, for four years:**

<b>Tasks</b>	<b>Estimated workload per unit in working day (wd)</b>	<b>Indicative number of tasks likely to be requested for 4 years</b>	<b>Outputs expected</b>
a. Support Physical Platform meetings organisation	80 wd	Up to 12	Report of the Physical Platform meeting  When requested, policy recommendations
b. Support to Online Platform meeting organisation	20 wd	Up to 24	Report of the Online Platform meeting  When requested, policy recommendations
c. Participation to events (experts attending (not organising) events linked to projects they monitor, or experts supporting participation in third party events)	1 wd	1290	Upon request, prior to participation, the Technical Monitoring expert may be requested to share information with the Contracting Authority and/or the experts from the Thematic support team organising the event.  Report (if several experts attending the same event, combined report)  Events last typically 2-4 wd. Amount of wd for a given event to be pre-discussed with Contracting Authority, depending on input requested for the event.

**Indicative workload of communication & logistics experts linked to task 3.3.a and 3.3.b, for four years (costs to be covered within task 4.5.3.f):**

<b>Tasks</b>	<b>Estimated workload per unit in working day (wd)</b>	<b>Indicative number of tasks likely to be requested for 4 years</b>	<b>Outputs expected</b>
a. Support Physical Platform meetings organisation	20 wd	Up to 4	Physical setup (venue, catering, etc) in line with needs expressed by Contracting Authority

b. Support to Online Platform meeting organisation	8 wd	Up to 24	Registration platform and digital hosting in line with needs expressed by Contracting Authority
----------------------------------------------------	------	----------	-------------------------------------------------------------------------------------------------

### Task 3.4 Supporting national Info Days

National Contact Points may organise national events in EU Member States<sup>53</sup> for potential applicants to a LIFE call for proposals. The number of events, their scope and format, for example the number of participants and whether they are held in person or virtually may vary significantly. The largest event may involve up to 200 participants over one day. The logistical arrangements are organised by the host Member State or region.

The services to be performed under Task 3.4 shall be remunerated in accordance with the sub-tasks set out in the Financial Offer form (Annex 6), namely:

- sub-task 3.4.a, covering the preparation and updating of the Masterfile document;
- sub-task 3.4.b, covering the preparation of and virtual participation in one national Info Day, priced per event;
- sub-task 3.4.c, covering the preparation of and physical participation in one national Info Day, priced per event.

Every year, based on the novelties of the call for proposals that will be provided by the Contracting Authority, the contractor shall update a Power-Point document respecting visual identity guidelines provided by the Contracting Authority to be used as Masterfile for all events in which Contracting Authority staff may participate. This document will be in English.

Upon request from the Contracting Authority, the contractor shall participate in specific national events to deliver presentations about the corresponding call. The contracting authority will assess whether and to which extent such support will be needed as regards post-2027 calls for proposals.

Tenderers shall present the main messages they would communicate to future applicants on grant management.
------------------------------------------------------------------------------------------------------------

### Indicative workload linked to task 3.4, for four years:

Tasks	Estimated workload per unit in working day (wd)	Indicative number of tasks likely to be requested for 4 years	Outputs expected
a. Preparing the Masterfile document	10 wd	4	Updated Masterfile

<sup>53</sup> EU Member States, including overseas countries and territories (OCTs), and in the countries associated to the LIFE Programme ([participating countries](#)).

b. Preparation of and virtual participation in national event information day	2 wd	20	Power point presentation in national language Event/workshop report
c. Preparation of and physical participation in national information day	3 wd	20	Power point presentation in national language Event/workshop report

### **Task 3.5 Delivering policy briefs and other reports and studies**

Under this task, the contractor shall provide, upon request from the Contracting Authority, specific reports, studies and policy briefs, at a grant, theme or sector level, dedicated to the use of LIFE resources, to analytical reviews, to assessment of the efficiency of beneficiaries and grants performance, or to outreach towards groups of stakeholders such as investors and incubators.

For the services to be performed under Task 3.5, tenderers shall submit the daily rate required in the Financial Offer form. The studies, reports and policy briefs described below do not constitute separately priced items. The corresponding workload shall be defined in the relevant request for services.

Those services may also include highly specialised expertise not already included in the framework contract team of experts. In response to a specific request for services, the contractor shall submit an offer for the assignment concerned and shall include if needed the CVs<sup>54</sup> of any additional experts proposed.

This work should be performed based on the outcomes of the monitoring tasks or platform meetings, on the impact indicators provided by the beneficiaries at the various stages of the grants' implementation, and any other available relevant data.

When required, the contractor shall, in the context of such deliverables, analyse the expected results and assess the expected overall direct environmental or climate benefits, as well as the expected economic and financial benefits. In addition, the contractor shall provide a critical analysis of the dissemination, sustainability and replication measures proposed by the beneficiaries for their projects together with the barriers that hinder those measures.

This task will be performed by the Thematic Support team with the support of the technical monitoring experts.

In particular, the contractor may be requested the studies mentioned below.

#### Studies to support the assessment of the performance and the impact of LIFE Programme

The contractor may be asked to provide some sectoral studies to support the assessment of the performance and the impact of the LIFE Programme.

The purpose of these studies will be to analyse the extent to which the projects have contributed to achieve specific indicators linked to the objectives of the programme, or to specific policies

<sup>54</sup> The CVs should be drafted in English following the EU standard form (<http://europass.cedefop.europa.eu/fr/documents/curriculum-vitae/templates-instructions>)

supported by the programme, while analysing, to the extent possible, the economic benefits linked to the projects, their impact and added value for the communities involved.

In this context, such studies will support the preparation of the ex-post assessment of the LIFE programme.

The support studies could require the following:

- review the implementation and results of selected LIFE projects;
- carry out stakeholder consultation activities;
- assess the effectiveness, efficiency, coherence, relevance, EU added value of the LIFE projects;
- identify impacts for the communities involved;
- assess the contribution of the LIFE Programme to specific policy or legislative objectives and targets;
- validate the estimated programme contribution to climate-related expenditure and biodiversity-related expenditure;
- identify and, to the extent possible, quantify the economic benefits of the projects;
- estimate whether (and if so, to what extent) synergies between the various objectives and the integration of environment and climate objectives into other Union policies have been obtained;
- assess the extent to which synergies were realised with other programmes. provide recommendations on how to improve the programme’s implementation.

**In terms of the temporal and substantive scope**, the studies may concern grants financed during the period of 2014 to 2027 and their contribution to the LIFE Programme objectives as described in the programme’s intervention logic as well as to the goals of the European Green Deal.

**Indicative workload linked to task 3.5, for four years:**

Tasks	Estimated workload per unit in working day (wd)	Indicative number of tasks likely to be requested for 4 years	Outputs expected
a. Study to support the assessment of the LIFE Programme 2021-2027	375 wd	1	Kick-off minutes Methodology for the study Final report

b. Other input from technical monitoring experts to reports or studies	1 wd	1000	Report of event When requested, recommendations policy
------------------------------------------------------------------------	------	------	-----------------------------------------------------------

### Task 3.6 Follow-up monitoring of Green Assist assignments

Under this task, the contractor shall implement an ex-post follow-up monitoring of some support assignments delivered previously by the [Green Assist](#) advisory service. The purpose is to assess the progress made, the maturity, and the investments mobilised as a result of the advisory services provided. This task is expected to take place from the last quarter of 2027 till the first quarter of 2029.

For the services to be performed under Task 3.6, tenderers shall submit the daily rate required in the Financial Offer form. The surveys, phone calls, reports and indicative volumes described below do not constitute separately priced items. They are provided solely to describe the expected scope and workload of the task.

Such monitoring shall cover both the beneficiaries of the support assignments and the experts who provided the advisory service. Therefore, each assignment results in two separate surveys, one for the beneficiary and one for the expert, and two follow-up calls, one with the beneficiary and one with the expert. Both the surveys and the follow-up calls shall be conducted twice: once immediately after completion of the assignment and once one year after its completion.

The assignments shall include the following sub-tasks:

A. Conducting surveys, collecting and aggregating data:

- Online surveys for beneficiaries and experts, to be completed immediately after the assignment has been completed: 70 to 100 assignments;
- Follow-up online survey for beneficiaries and experts, to be completed one year after the assignment has been completed: 70 to 100 assignments.

Templates for both types of surveys are already available in EUSurvey (see Annex 7– Relevant information for tenderers). The main objective is to assess the investment expected to be triggered by the Green Assist advisory support provided.

B. Survey follow-up by phone after the submission of the answers:

- Enabling survey: 70 to 100 phone calls
- Follow-up survey 70 to 100 phone calls

C. Reporting :

- Report on aggregated data and case analysis after conclusion of at least 80% of enabling surveys and phone calls, not later than 9 months after the start of the relevant request for services. The report shall include the data collected both in the survey and the additional information obtained from the beneficiary or the expert during the phone call, statistics and an analysis of the data.

- Report on aggregated data and case analysis after conclusion of at least 80% of follow-up surveys and phone calls, not later than 15 months after the start of the relevant request for services. The report shall include the data collected both in the survey and the additional information obtained from the beneficiary/expert during the phone call. This report will constitute the final report for the follow-up monitoring of Green Assist assignments.

The report on aggregated data and case analysis will include data such relevant statistics, assignment and feedback analysis, and follow-up recommendations.

A report template is available (see Annex 7– Relevant information for tenderers).

**Indicative workload linked to task 3.6, for four years:**

<b>Tasks</b>	<b>Estimated workload per unit in working day (wd)</b>	<b>Indicative number of tasks likely to be requested for 4 years</b>	<b>Outputs expected</b>
a. Survey conducting	0.5 wd	200	Filled-in enabling survey Filled-in follow-up survey
b. Survey follow-up by phone	0.5 wd	200	Conclusions from phone call
c. Reporting and management	30 wd	1	2 reports on aggregated data (see detailed task description)

#### **1.4.2.2.4. Service 4 - Communication and logistics support activities**

The contractor will be responsible for the timely and reliable delivery of all requested communication services including quality assurance and compliance with General Data Protection Regulation (GDPR)<sup>55</sup>.

The contractor shall provide, upon request from the Contracting Authority, all original files linked to the preparation of communication outputs.

The contractor shall provide pools of qualified communication experts able to cover the functions and tasks described in this service and able to respond to specific requests for services launched by each Contracting Authority.

The communication functions and activities under Service 4 are grouped under the following five tasks:

- Task 4.1: Communication tasks coordination and planning
- Task 4.2: Editorial work and design
- Task 4.3: Digital communication
- Task 4.4: Production of audio-visual content
- Task 4.5: Events and Promotional Material

The indicative workload tables at the end of each task summarise the main outputs and linked workload estimates for each subtask included in the Task 4.1 to Task 4.5.

The tasks shall not be carried out at the premises of the Contracting Authority, except when the meetings are held at the premises of the Contracting Authority or where specific tasks are performed by the contractor's staff on the premises of the Contracting Authority working as intra-muros<sup>56</sup>.

The Contracting Authority may request services provided by intra-muros experts, having a profile corresponding to one of the profiles requested under the selection criteria (professional capacity Profile B17).

Unless otherwise specified, for "intra-muros" experts, the IT equipment (i.e laptop) necessary for the execution of the services will be provided by the Contracting Authority.

Specific rules for the access of the contractor's personnel (intra-muros) are to be found under section 1.10 of this document and under Article 1.13 of the Framework contract template.

The communication team shall keep abreast of key developments in policy areas currently covered by the LIFE programme and in funded grants under all its sub-programmes, including LIFE Clean Energy Transition and grants that may be financed from 2028 onwards in the fields listed in point b at the start of section 1.4.1. Its role is to provide up-to-date and sound advice on communicating about the programme and its grants; set up continuous contact with the monitoring and close-to-market teams, and build on the information gathered in through grant monitoring activities.

---

<sup>55</sup> <https://eur-lex.europa.eu/eli/reg/2016/679/oj>

<sup>56</sup> For the purposes of this contract, the term 'intra-muros' refers to staff employed by the contractor and working on the premises of the Contracting Authority in Belgium.

The communication team may be entrusted with the promotion of actions under the LIFE programme and of grants that may be financed from 2028 onwards years in the fields listed in point b at the start of section 1.4.1. In this context, the contractor may be requested to organise and promote actions or to implement events promoting [Green Assist](#) to stakeholders, beneficiaries and experts.

It should be emphasised that the actual requests for services linked to Service 4 will strongly depend, especially for communication-related tasks, on the new Multiannual Financial Framework for the period 2028-2034 and its operationalisation in terms of funding programmes and communication policies.

In line with the Commission's internal guidelines on the use of AI, to ensure transparency, the contractor shall always acknowledge the use of an AI tool when publishing AI-generated content (and, as the case may be, explain how it has been used and for which parts of a document/content).

At all times, the Contractor must follow:

- the rules laid down in the Europa Web Guide<sup>57</sup> organising the European Commission web presence;
- the Interinstitutional Style Guide;<sup>58</sup>
- the European Commission visual identity;<sup>59</sup>
- the Commission's standard IT technical tools;<sup>60</sup>
- DG COMM's social media guidelines.<sup>61</sup>

The Contractor must perform full quality control of all services provided.

The price offered for the cost of Task 4.1 will be a lump sum cost covering the activities under that task.

#### **Task 4.1 – Communication tasks coordination and planning**

The services to be performed under Task 4.1 shall be remunerated as one fixed-price unit, as set out in the Financial Offer form. This fixed price shall cover the activities and outputs described under this task, for a period of 12 months. For pricing purposes only, the combined workload for these subtasks is estimated at 42 working days per 12-month period. Where the period concerned is shorter or longer than 12 months, remuneration shall be adjusted in proportion to the actual duration.

---

<sup>57</sup> [https://commission.europa.eu/resources-partners/europa-web-guide\\_en](https://commission.europa.eu/resources-partners/europa-web-guide_en)

<sup>58</sup> <https://style-guide.europa.eu/en/home>

<sup>59</sup> [https://ec.europa.eu/info/resources-partners/european-commission-visual-identity\\_en](https://ec.europa.eu/info/resources-partners/european-commission-visual-identity_en)

<sup>60</sup> [https://commission.europa.eu/resources-partners/europa-web-guide/design-content-and-development/development-platforms-tools-and-it-standards\\_en](https://commission.europa.eu/resources-partners/europa-web-guide/design-content-and-development/development-platforms-tools-and-it-standards_en)

<sup>61</sup> [https://commission.europa.eu/resources/europa-web-guide/additional-resources/social-media/using-social-media\\_en](https://commission.europa.eu/resources/europa-web-guide/additional-resources/social-media/using-social-media_en)

## **Coordination and planning**

The contractor shall contribute to the development of LIFE programme communication activities across all its sub-programmes, and potentially to communication activities linked to grants that could be financed from 2028 onwards in the fields listed in point b at the start of section 1.4.1, taking into account their specificities. The contractor shall define annual implementation plans based on the priorities set by the Contracting Authority; contribute to the definition and planning of communication campaigns; define clear and measurable communication objectives and key performance indicators for each activity in accordance with Contracting Authority's KPIs; define key messages, communication channels, products and dissemination strategies including identifying dissemination networks, partners and events; provide grant management and planning tools; identify impact monitoring tools and monitoring the implementation of the communication activities.

Where requested under a specific request for service, the contractor shall draft annual communication implementation plans, and submit corresponding progress reports on a six-month basis, under the supervision of the Contracting Authority, which should comprise measurable communication objectives and key performance indicators for each of the planned activities, in accordance with Contracting Authority's KPIs, based on the [2022 EC Commission indicators](#).

Some tasks will depend on data produced by the monitoring team or Contracting Authority internal services such as grant lists, results and deliverables as well as specific outputs expected during the requirements. The contractor will establish a mechanism that will ensure exchanges of data in a timely and efficient manner. This mechanism will define clear responsibility for the monitoring and communication teams and necessary flows of data and timeline.

During the contract implementation, the cooperation between the monitoring and communication teams will also entail regular meetings to discuss challenges and mitigate any service disruptions.

## **Set up quality management and control system for communication services**

The contractor shall ensure a high-quality standard for all services delivered and full compliance with General Data Protection Regulation (GDPR). To this end, the contractor shall set up and implement a quality management and control system and the tenderers should demonstrate in their offer how quality will be assured in the delivery of all different services and tasks.

The contractor shall monitor and assess the communication activities and draw conclusions, and propose appropriate adjustments whenever necessary. The contractor shall propose actions for measuring the impact of the communication activities, for example editorial and social media calendar, events, events participation as well as the distribution of print thematic publications; provide media monitoring of the Programme and the grants; prepare, collect and analyse participants' feedback and satisfaction using appropriate tools such as questionnaires, online tools, interviews; monitor social media and online traffic, and analyse statistics; propose improvements and adapt web and social media content.

The contractor shall ensure the full traceability and safety of all data and information related to the programme and grants being promoted. The contractor shall ensure effective storing and updating of the information necessary for the communication activities. Any processing operations performed on behalf of the Agency/Commission are subject to Article 23 of Regulation (EU) No 2018/1725, and other specific instructions provided by the Contracting Authority in the context of the implementation of their specific contracts. This system shall be

complete and in operation no later than three months after the signature of the first specific contract. To fulfil this objective, the contractor may develop a specific IT system.

The contractor’s use of such a system for the purpose described above shall not affect its obligation to use the IT systems provided by the Contracting Authority to submit the outputs produced during its monitoring of communication activities.

**Mapping of stakeholders and key audiences**

Upon request from the Contracting Authority, the contractor shall carry out stakeholders and key audiences map exercises, which may be based on a sub-programme, thematic priorities, or other relevant criteria such as geographical coverage. This will support the contractor in better planning, tailoring, and delivering the communication activities.

The contractor shall place particular emphasis on identifying and highlighting organisations that are not yet involved in the LIFE Programme. For organisations already involved in the LIFE Programme, the Contracting Authority will provide available information to facilitate the task.

Stakeholders in the wider context are organisations that are or could be involved in the implementation of LIFE programme objectives, as set out in the LIFE Regulation. Different key audiences to promote the programme and grant results are targeted. These key audiences comprise, for example, potential applicants, multipliers, media and associations. The Contracting Authority might request up to seven mapping exercises.

Tenderers shall outline in the offer the quality management and control system to ensure the timely, professional, and high-quality delivery of all communications services and tasks.

In addition, tenderers shall explain how they will ensure the coordination between the monitoring team and the communication team at the task implementation level.

In particular, they shall illustrate in their offer how the Central coordination will function in practice by developing an illustrative example whereby the communication experts will build on the grants’ findings coming from the monitoring experts that are found highly relevant to feature in communication activities delivered under Service 4.

**Indicative workload linked to task 4.1, for four years:**

Tasks	Estimated workload per unit output in working days (wd)	Timeline	Indicative number of units likely to be requested (for the 4 years)	Output expected
Communication tasks coordination and planning	8 wd	60 calendar days after contract start;  30 calendar days for following years	4	Draft and update Annual communication implementation plans, including mid-term reports

	<b>10 wd</b>	30 calendar days after contract start		Set up, track and assess Key performance indicators for each communication service
Quality management and control system	<b>15 wd</b>	30 calendar days after contract start	<b>4</b>	Annual reviews (and adjustments – if needed) of the quality management and control system for Service 4 delivered at the outset of the contract.
Mapping of stakeholders and key audiences	<b>5 wd</b>	30 calendar days after request from the Contracting Authority	<b>Up to 4</b>	Mappings of stakeholders
	<b>5 wd</b>	30 calendar days after request from the Contracting Authority	<b>Up to 3</b>	Mapping of key-audiences

#### **Task 4.2 – Editorial work and design**

The contractor in close collaboration with the technical monitoring team will be responsible for the timely and reliable delivery of editorial work, based on the needs of the Contracting Authority.

The services to be performed under Task 4.2 shall be remunerated in accordance with the sub-tasks set out in the Financial Offer form. Each deliverable described under this task shall be priced on the basis of the corresponding unit indicated in that form. The costs linked to the tools used, like software licenses, shall be embedded within the unit costs indicated for the sub-tasks (4.2.1, etc.) in the Financial Offer form. The descriptions and indicative quantities set out below are provided to define the scope of those deliverables and to enable tenderers to price them on a comparable basis.

##### **Task 4.2.1 Production of thematic publications**

Under task 3.5 ‘Delivering policy briefs and other reports and studies’, the monitoring team will provide the required technical content for publications to be prepared by the communications team under this task 4.2.1.

**Conception and dissemination:** the contractor’s communication team shall develop innovative, intuitive, digitally friendly media outputs, such as thematic brochures<sup>62</sup>, factsheets,

---

<sup>62</sup> Definition of thematic brochures, factsheets and infographics is provided further down.

infographics, briefings, reports and other publications, to showcase specific thematic and programme results, taking into account the target audiences and the intended dissemination strategy. It shall also elaborate and implement tailor-made dissemination plans for specific audiences to maximise the impact and cost-effectiveness of the actions, including multiplier analyses and ways of building influence and relationships in the long term.

**Journalistic and analytical research:** the contractor's communication team shall conduct journalistic and analytical research on specific subjects or thematic focus from different sources including: Programme statistics and documents, material produced by beneficiaries and grant results, policy documents, input from European Commission and CINEA staff and other sources. The contractor shall compile raw information from documents; conduct interviews, namely with grant beneficiaries and EU institutions staff; gather, digest, compile and catalogue material produced by grants (reports, videos, etc.); and manage related copyright issues.

**Copywriting:** the contractor's communication team shall draft and edit original content in English on the basis of the information and raw material gathered, using a result-oriented approach. It shall tailor the language and style to the relevant platform, whether its web or print, and to the intended audience, such as the media, policy makers, businesses, public administration, or citizens. It shall also proofread the content, introduce content produced directly into web content management systems, including grant databases.

**Layout and design:** the contractor's communication team shall develop and produce the design and layout of brochures, leaflets, posters, conference kits, programmes, layout of presentations (e.g. PowerPoint, flash animations) and other relevant products, respecting the EU visual identity for publications, and shall make the corresponding digital files available to the Contracting Authority.

**Photos and illustrations:** the contractor's communication team shall create and research images, including sourcing them from grants, illustrations, and infographics for all types of information material, including photo exhibitions, produce photo-journalistic reports and take photos of professional quality for publications and websites including event coverage; purchase stock photos and illustrations for multiple uses in various contexts, including editorial research and the management of copyright-related issues in compliance with applicable intellectual property rules.

The contractor must ensure that all necessary permissions and copyright clearances for taking and using pictures images and any other visual material have been obtained.

**Proofreading:** the contractor must ensure that all publications are of the highest linguistic quality and are edited and proofread by a native speaker or equivalent.

**Production:** the contractor shall provide printing services upon request from the Contracting Authority.

The main categories of publications are thematic brochures, factsheets and infographics:

- **An infographic corresponding to sub-task 4.2.1.a:** one-page collection of imagery, data visualizations like pie charts and bar graphs and minimal text that gives an easy-to-understand overview of a topic. Infographics are standalone deliverables and cannot be considered as part of another deliverable (such as factsheets or brochures)<sup>63</sup>.

---

<sup>63</sup> Infographic examples :

[https://cinea.ec.europa.eu/publications/digital-publications/how-life-protects-europes-peatlands-infographic\\_en](https://cinea.ec.europa.eu/publications/digital-publications/how-life-protects-europes-peatlands-infographic_en)

- A **factsheet corresponding to sub-task 4.2.1.b**: a publication on average 6 A4 pages with a range of 4 to 12 A4 pages. It usually provides a brief overview of the contribution of the LIFE funding in a certain thematic area, including both aggregated information as the one included in infographics, and a few specific grant examples, as well as other content such as an overview of the relevant current and upcoming policies in the subject area<sup>64</sup>.
- A **brochure corresponding to sub-task 4.2.1.c**: a publication on average 40 A4 pages with a range of 25 to 50 A4 pages. It provides a detailed overview of the contribution of LIFE funding in a certain thematic area, including both aggregated information as the one included in infographics, and a number of specific grant examples, as well as other content such as quotes from relevant stakeholders, contributions from EC officials and an overview of the current and upcoming policies in the subject area<sup>65</sup>.

All publications shall include the design of a separate A4 with a QR code for promotional purposes in events and a visual adapted for social media. Exceptionally, the contractor may be requested to update existing publications. In such cases, access will be granted to the contractor.

### **Task 4.2.2 Project summaries**

The LIFE programme maintains a public projects [database](#) with summaries on all funded projects. Upon specific request for services, the contractor's communication team will be requested to edit project summaries in English, on an annual basis, for:

1. Around 350 ongoing projects;
2. Around 130 to 160 new projects; and
3. Around 150 recently closed projects.

This task requires collaboration with the monitoring team, which shall initially prepare the content of the project summaries and provide the material needed for further editing and encoding in Butler. Some editing will also be requested by the project beneficiaries. The contractor shall proofread, and refine the texts and ensure that the final products follow a clear journalistic style.

The following sub-tasks shall apply:

- 4.2.2.a** update of one project summary;
- 4.2.2.b** editing and online publication of one new project summary;
- 4.2.2.c** finalisation of one project summary for a recently closed project.

### **Task 4.2.3 Drafting of press releases**

Upon specific request for services, the contractor will draft annually up to two press releases on newly signed projects in English.

---

[https://cinea.ec.europa.eu/publications/digital-publications/bringing-nature-back-through-life-infographic\\_en](https://cinea.ec.europa.eu/publications/digital-publications/bringing-nature-back-through-life-infographic_en)  
[https://cinea.ec.europa.eu/publications/digital-publications/life-and-marine-pollution-infographic\\_en](https://cinea.ec.europa.eu/publications/digital-publications/life-and-marine-pollution-infographic_en)  
[https://cinea.ec.europa.eu/publications/digital-publications/life-and-new-european-bauhaus-infographic\\_en](https://cinea.ec.europa.eu/publications/digital-publications/life-and-new-european-bauhaus-infographic_en)

<sup>64</sup> Factsheet example: [Super soil: How LIFE protects what lies beneath our feet - European Commission](#)

<sup>65</sup> Brochure examples:

[https://cinea.ec.europa.eu/publications/digital-publications/together-biodiversity\\_en](https://cinea.ec.europa.eu/publications/digital-publications/together-biodiversity_en)  
[https://cinea.ec.europa.eu/publications/digital-publications/construction-skills-cordis-results-pack-brochure\\_en](https://cinea.ec.europa.eu/publications/digital-publications/construction-skills-cordis-results-pack-brochure_en)

The following sub-tasks shall apply:

- 4.2.3.a** Annual SAP press release, including a long annex currently expected to contain short summaries of approximately 130 to 160 projects;
- 4.2.3.b** Annual STRAT press release, including a shorter annex currently expected to contain short summaries of approximately 10 to 15 projects;
- 4.2.3.c** Annual LIFE Awards press release, including an annex with short descriptions of finalists, currently expected to cover no more than 16 projects per year.

The member of the team designated as contact person for this task must have journalist experience.

**Task 4.2.4 Country overviews**

LIFE maintains country overviews<sup>66</sup> with information of all LIFE projects and activities in the particular country. Upon specific request for services, the contractor shall be requested to update the current country overviews, including all EU Member States, UK and countries participating to the LIFE Programme or post-2027 successor funding instruments in the fields of activity listed in point b at the start of section 1.4.1, on an annual basis with new projects, activities and programme statistics and a new layout if needed.

The country overviews shall be updated in English, and in addition the contractor shall produce a version in the national language of the respective country. This task will require coordination and obtaining technical input from the monitoring team in particular updated information on successful projects. The contractor may be requested to create new country overviews to cover newly participating countries when applicable.

Each country overview shall include a separate A4 page with a clear, attractive layout, including a QR code directing to the online version of the overview and a visual to promote it on social media.

The tenderers shall describe in detail in their offer their idea of innovative, intuitive, digitally friendly media outputs described in task 4.2.1 with high impact on the target audience whilst at the same time respecting the core LIFE programme objectives.

For Task 4.2.4, tenderers shall submit one unit price per country overview, as set out in the Financial Offer form. This unit price shall cover the services normally required for one country overview, including the update or preparation of the overview in English, the preparation of the corresponding version in the national language, and the related QR-code page and social media visual.

Indicative workload for task 4.2, for four years:

Tasks	Estimated workload per unit output in working days (wd)	Timeline	Indicative number of units likely to be requested (for 4 years)	Output expected

<sup>66</sup> Source for country overviews: [LIFE in European countries \(europa.eu\)](http://europa.eu)

4.2.1 Production of thematic publications	5 wd <sup>67</sup>	Upon request of the Contracting Authority	20	Thematic/programme results infographics (1 page each)
	3 wd		96	Factsheet: The unit is the page DIN A4. It is expected that a factsheet would have on average 6 pages with a range of 4-12 pages DIN A4
	1.5 wd		160	Brochure: The unit is the page DIN A4. It is expected that a brochure would have on average 40 pages with a range of 25-50 pages DIN A4
4.2.2.a Project summaries	0.08 wd	Upon request of the Contracting Authority.  Update upon request for summaries of ongoing projects.	1400	Updated projects summaries
4.2.2.b Project summaries	0.5 wd	Yearly publication of summaries of new projects	640	Editing and online publication of summaries of new projects summaries
4.2.2.c Project summaries	0.2 wd	Upon conclusion of the projects.	600	Finalised project summaries of recently closed projects.
4.2.3 Drafting of press releases	15 wd	Upon request of the Contracting Authority	4	Annual SAP press release with long annex (130-160 project summaries)
	5 wd		4	Annual STRAT press release with short annexes (10-15 project summaries)

<sup>67</sup> For the case of updating an existing publication, the workload is smaller, estimated at around 50% of the amount for a new publication (e.g. 3 wd/page for an infographic)

	5 wd		4	Annual LIFE Awards press release with annex with short descriptions of finalists
4.2.4 Country overviews	3 wd	Yearly update	132	Country overviews (updates)

### Task 4.3 – Digital communication

The services to be performed under Task 4.3 shall be remunerated in accordance with the sub-tasks set out in the Financial Offer form. Depending on the sub-task concerned, the relevant price may be an updated editorial calendar, an event notice, a digest of LIFE visibility in the media, a piece of news, a report, a photo or video, a publication, or a working day.

The costs linked to the tools used shall be embedded within the unit costs indicated for the sub-tasks (4.3.1.a, etc.) in the Financial Offer form. These include media monitoring tools/software including social media management (such as CX social) and web news monitoring (such as Wachete), costs for setting up and maintaining one campaign website per year, and costs for online and offline advertising, including in the printed press, online media, audio-visual media and social media as well as photos and illustrations, music and sounds (licenses), and costs for hosting services for websites and databases.

The indicative monthly or annual figures described below are provided solely to indicate the expected scope and workload of the task.

For each subtask, the contractor shall develop innovative concepts for the design and drafting of online communication content, including web, social media, and audiovisual material, taking into account the target audiences and the intended dissemination strategy. The contractor shall also develop and implement tailor-made dissemination plans for specific audiences to maximise the impact and cost-effectiveness of the actions, including multiplier analysis and ways of building influence and relationships in the long term, using different technology channels and platforms. In addition, the contractor shall create and update mailing lists.

Unless otherwise specified, the tasks shall be carried out at the contractor’s or the communication experts’ premises. The activities specifically assigned to the intra-muros expert shall be carried out by staff employed by the contractor and working under an intra-muros arrangement in Belgium, remotely by default, with presence at the Contracting Authority’s premises where required, up to four times per month.

The tasks and profile of the intra-muros experts are described below under tasks 4.3.1.f, 4.3.1.g, 4.3.3 and under the selection criteria, professional capacity Profile B17.

The Contracting Authority may request that other subtasks (or part of them) among those described below under task 4.3 are provided by intra-muros experts.

Unless otherwise specified, for intra-muros experts, the laptop necessary for the execution of the services will be provided by the Contracting Authority. However, the contractor shall provide all social media tools, including those for design (other than CANVA), video production, and social listening.

Specific rules for the access of the contractor's personnel (intra-muros) are to be found under Article 1.13 of the Framework contract.

This service requires coordination with the monitoring team and the provision of their technical input.

#### **Task 4.3.1 News monitoring, planning and editorial calendar**

The contractor shall monitor media and news coverage on the LIFE programme and grants activities, including potentially post-2027 grants in the fields listed in point b at the start of section 1.4.1, and analyse the communication value of such coverage in order to increase the programme profile, promote the results and impact of the grants and attract applicants to funding opportunities.

The contractor shall identify news hooks and story angles with a particular focus on links to EU policy initiatives in areas currently covered by the LIFE programme. The contractor shall set up and maintain an editorial calendar in collaboration with the Contracting Authority.

The following sub-tasks shall apply:

##### **Subtask 4.3.1.a Update of the editorial calendar twice a month**

The contractor shall update the editorial calendar twice per month in cooperation with the Contracting Authority.

##### **Subtask 4.3.1.b Event notice drafting, updating and publishing**

Tenderers shall submit one unit price per event notice, as set out in the Financial Offer form.

The contractor shall draft, update and publish approximately 10 event notices per month, each consisting of approximately 150 words, on the basis of information provided by the grants regarding their participation in events or information concerning events at programme level.

##### **Subtask 4.3.1.c Weekly digest of LIFE Programme visibility in the media**

The contractor shall provide the Contracting Authority with a weekly digest of the programme's and the grants' visibility in the media. The criteria for its set-up shall be agreed with the Contracting Authority. The contractor shall also produce specific media monitoring reports on major events and communication campaigns, such as the LIFE Awards, and on the results of the calls for proposals.

##### **Subtask 4.3.1.d News stories**

Tenderers shall submit one unit price per piece of news, as set out in the Financial Offer form.

The contractor shall draft and publish approximately six news stories per month in English on the programme's website, aligned with current policy priorities and accompanied by an image provided by the relevant grant, taken at an event, sourced from a stock image database, or prepared by the social media manager for use also on social media. The news items shall be 600 to 700 words long, may include quotes from beneficiaries where relevant, and shall focus on the impact of the programme or the grants. The contact person for this task shall be a team member with journalistic experience.

##### **Subtask 4.3.1.e Weekly summary of LIFE grants-related news**

The contractor shall provide the Contracting Authority with a weekly summary of news relating to ongoing and recently closed LIFE grants, including, where relevant, post-2027 grants in the fields listed in point b at the beginning of Section 1.4.1, using an appropriate monitoring tool such as Wachete.

#### **Subtask 4.3.1.f Monthly communication updates for the EC community linked to LIFE**

The contractor shall, upon request from the Contracting Authority, compile, edit and publish monthly communication updates, with up to 12 issues per year in English, for the relevant EC community.

This subtask will be performed by the intra-muros community manager, as part of his/her tasks, which include as well subtask 4.3.1.g and task 4.3.3.

#### **Subtask 4.3.1.g Monthly LIFE newsletters**

The contractor shall, upon request from the Contracting Authority, manage, publish and update the monthly LIFE newsletter in English, with up to 12 issues per year, using the Commission corporate template and tool, (newsroom)<sup>68</sup>.

This subtask will be performed by the intra-muros community manager, as part of his/her tasks, which include as well subtask 4.3.1.f and task 4.3.3.

#### **Task 4.3.2 Web editing**

For Task 4.3.2, tenderers shall submit one unit price covering the costs for website maintenance and updates, including the delivery of a monthly report describing such activities, for a period of 12 months, as set out in the Financial Offer form. The activities described below shall be covered by that unit. For pricing purposes only, the combined workload for these subtasks is estimated at 96 working days per 12-month period. Where the period concerned is shorter or longer than 12 months, remuneration shall be adjusted in proportion to the actual duration.

The contractor shall manage the [LIFE section of CINEA's website](#), which includes the edition and adaptation of texts, such as messages, snippets, website content, news stories, event announcements, interviews and newsletters for online publication.

The contractor shall perform regular and ad-hoc updates of the existing content of this website; introduce content produced directly into web content management systems (Drupal) such as event notices, publications, weekly news, regular updates of the different sections including call for proposals, success stories, sub-programmes pages, propose improvements and innovations.

Where applicable and in agreement with the Contracting Authority, the contractor shall maintain existing campaign sites such as the [LIFE Awards Citizens' Prize](#). This shall include site verification and checking, including audits covering quality control, compliance with data protection and copyrights rules, Web Accessibility Initiative, as well as link checking, standards verification, hosting, content archiving, and back-ups for all site components.

---

<sup>68</sup> Newsletters compile news published on the web and social media and are distributed via the European Commission's Newsroom platform: <https://ec.europa.eu/newsroom/cinea/newsletter-archives/36081>

### **Task 4.3.3 Social media**

This task shall be assigned to one senior full-time Community Manager (see section 3.2 Selection criteria criterion P16) working as Intra-muros, based in Belgium<sup>69</sup>, who will be the single contact point for the Contracting Authority for all matters relating to this task.

The Community Manager tasks include as well subtasks 4.3.1.f and 4.3.1.g.

The Community Manager will focus on the community management in the relevant social media channels, currently X, LinkedIn, Facebook, Instagram and YouTube<sup>70</sup>.

The Community Manager will:

- undertake community management ensuring multi-channel coherence of the relevant online community and foster engagement;
- implement and update, as needed, the social media strategy, ensure weekly monitoring and reviews.

In collaboration with the communication team, the community manager shall:

- plan, implement, monitor and analyse social media activities, adapting the strategies, topics, posts, language and tone to each social media channel. S/he shall implement around 10 social media activities (e.g. news publications) per day;
- coordinate with the editorial team, other communication experts and internal services at all times to ensure consistency in our messages and outputs;
- keep track of all LIFE grants, including potentially post-2027 grants in the fields listed in point b at the start of section 1.4.1, and relevant stakeholders' social media channels;
- conduct audience analysis and develop tailored messaging strategies that resonate with each group;
- plan, run and monitor campaigns in the relevant channels to promote specific activities, including drafting, implementing and evaluating strategy documents and providing social media templates for events and others, when requested;
- manage the functional mailbox where grant beneficiaries send their requests;
- source the necessary materials, including visuals and videos from grants, events, and ceremonies, ensuring that all content complies with copyright requirements;
- perform community management and publication of engaging and high impact content on the existing social media channels;
- design and produce audiovisual material, providing a variety of formats, including visuals, carousels, animations, infographics, charts, videos, and any other innovative content developed specifically for social media, using tools such as CANVA;

---

<sup>69</sup> The Community Manager can work remotely and is expected to go to the Contracting Authority's premises not more than 4 times per month.

<sup>70</sup> Links to current LIFE Programme social media channels: [X](#) , [LinkedIn](#) , [Facebook](#) , [Instagram](#) , [YouTube](#)

- identify, research, and propose suitable influencers for potential collaboration;
- manage the YouTube channel by creating new playlists, updating existing ones, optimising content and promoting videos to increase reach and engagement; provide digital marketing including buying advertising, develop or purchase of social media applications and the production of mini-sites; analyse trends and innovations in the field, provide advice on them and apply them when appropriate, including for community management and the publication of engaging and high impact content on the existing social media channels;
- manage, publish, update monthly newsletter: up to 12 issues in English using the EC corporate template and tool (newsroom)<sup>71</sup>; including analysis of results and metrics and proposal of visual and content improvements; and
- compile, edit and publish monthly communication updates: up to 12 issues in English for the relevant EC community.

Sub-activities may include, among others:

- Supporting the identification of core messages to communicate on the grants, perform target group monitoring analysis and identify key target audiences and stakeholders to engage with, etc. producing a weekly social media editorial calendar as well as social media actions to reach key performance indicators;
- Updating objectives, key performance indicators and engagement objectives per channel (reach, engagement) for X, LinkedIn, Facebook, Instagram and YouTube, and any additional social media channels designated by the Contracting Authority. Generate creative ideas that are specific, measurable, achievable, realistic and time-bound, ensuring localisation towards audiences (geography, behaviours and expectations);
- Managing the online relevant community;
- Providing and applying recommendations on how to improve social media performance and engagement;
- Disseminating and promoting community activities (news, events, podcasts, articles, videos)

#### **Task 4.3.4 Databases**

The contractor shall update databases, in particular the current audiovisual databases of the LIFE programme, including its maintenance, technical update and improvements; perform regular information, content and directories updates including adding documents, text, hyperlinks, set up a systematic quality control system for updates; capture and analyse information about usage; provide database hosting whenever necessary and ensure that the link with the [Commission AV portal](#) is made and all relevant audio-visual material is published there for public use.

---

<sup>71</sup> Newsletters compile news published on the web and social media and are distributed via the European Commission's Newsroom platform: <https://ec.europa.eu/newsroom/cinea/newsletter-archives/36081>

In particular, the contractor shall be responsible for uploading and filing all materials produced by LIFE grants, including past, current and potentially post-2027 grants in the fields listed in point b at the start of section 1.4.1, either in the existing EC audio-visual database (Beluga), where such material have so far been uploaded, or in a new tool proposed or developed by the contractor, such as Digital Asset Management (DAM), accessible to the Contracting Authority and with prior approval by the Contracting Authority. The contractor shall ensure that all relevant documentation, including copyright information and usage rights, is properly collected and filed.

The contractor shall update the on-line library of grant publications with approximately 500 documents per year.

Sourcing of AV material from databases, archives, grants might be asked on ad-hoc basis for specific campaigns, collaborations with the Commission DGs, (events, publications not covered under another task and ad-hoc).

The existing public LIFE projects database is available in <https://webgate.ec.europa.eu/life/publicWebsite/search>.

The following sub-tasks shall apply:

**Subtask 4.3.4.a Databases – Sourcing of audiovisual material and provision to the Contracting Authority**

Tenderers shall submit one unit price per photo or video, as set out in the Financial Offer form.

This sub-task shall cover the sourcing of audiovisual material and its provision to the Contracting Authority, where such material is not already covered under another task described under Service 4.

**Subtask 4.3.4.b Databases – Update of audiovisual database**

Tenderers shall submit one unit price per photo or video, as set out in the Financial Offer form.

This sub-task shall cover the uploading, filing and updating of audiovisual material in the relevant database, together with the related metadata and documentation.

**Subtask 4.3.4.c Databases – Update of the online library of grant publications**

Tenderers shall submit one unit price per publication, as set out in the Financial Offer form.

This sub-task shall cover the updating of the online library of grant publications.

Tenderers shall describe in their offer how they will monitor media and news coverage on the programme and grants activities. They shall analyse their news value for further communication purposes with the aim to increase the programme profile, promote results and attract applicants to funding opportunities.

Tenderers shall also describe in their offer what they propose in terms of Digital Asset Management for uploading and cataloguing all materials produced by the grants.

**Indicative workload linked to task 4.3, for four years:**

Tasks	Estimated workload per unit	Timeline	Indicative number of units likely to	Output expected
-------	-----------------------------	----------	--------------------------------------	-----------------

	<b>output in working days (wd)</b>		<b>be requested (for the 4 years)</b>	
4.3.1.a Event notices	0.25 wd	Continuous task	480	Drafting, updating and publishing of approx 10 event notices per month
4.3.1.b Bi-weekly update of the editorial calendar	0.65 wd		96	Update of the editorial calendar twice a month
4.3.1.c Weekly digest	1.5 wd		208	Weekly digest of LIFE programme and grants visibility in the media
4.3.1.d News stories	2 wd		288	Around 6 news stories per month
4.3.1.e Weekly grants news summary	1.5 wd		208	Weekly summary of grants news
4.3.1.f Internal newsletter	Full time community manager intra-muros		48	Monthly communication updates for the relevant EC community
4.3.1.g External newsletter	Full time community manager intra-muros		48	Monthly Newsletters
4.3.2 Web editing	96 wd		4	Updated LIFE Programme website  Monthly reports on maintenance of LIFE Programme website and web-content updates
4.3.3 Social media	Full time community manager intra-muros	Upon request of the Contracting Authority		Input to the annual social media strategy, analysis of results, proposals of innovations

		Continuous task  Continuous task		Ca. 10 social media activities per day  Design and layout audio-visual material developed specifically for social media (visuals, videos, carousels, etc.)
4.3.4.a Databases	0.16 wd	Continuous task	Up to 100 photos and 20 videos	Sourcing of AV material and provision to the Contracting Authority (not already included under other tasks under the description of Service 4)
4.3.4.b Databases	0.13 wd		Up to 1000 photos and 100 videos	Update audio-visual database (Beluga or proposed DAM)
4.3.4.c Databases	0.05 wd	Upon request of the Contracting Authority	2000	Update the on-line library of grant publications.
Estimated sub-total for 1 Community Manager (intra-muros)	880 wd (220 wd per year, 4 years) To perform tasks 4.3.1.f, 4.3.1.g, 4.3.3			

#### **Task 4.4 – Production of audio-visual content**

Videos in the context of this framework contract refer to “audio-visual material that includes raw material and/or animations and storytelling”.

The services to be performed under Task 4.4 shall be remunerated in accordance with the sub-tasks set out in the Financial Offer form, namely:

**Subtask 4.4.1**, covering the conception and dissemination plan for one short video clip, priced per short video clip;

**Subtask 4.4.2**, covering the production of one short video clip, priced per short video clip;

**Subtask 4.4.3.a**, covering one video tutorial, priced per video tutorial;

**Subtask 4.4.3.b**, covering one communication toolkit, priced per toolkit.

The costs linked to the tools used, like software licenses, shall be embedded within the unit costs indicated for the sub-tasks (4.4.1, etc.) in the Financial Offer form. The indicative yearly numbers of video clips described below are provided solely to indicate the expected scope and workload of the task.

#### **Task 4.4.1 Conception and dissemination**

For each video clip to be produced under this task, the contractor shall develop an innovative concept, format and script for audiovisual material relating to the programme, funded grants, and award nominees and winners. The contractor shall provide journalistic research, analyse and adapt content to produce compelling stories; elaborate and implement tailor-made dissemination plans for specific audiences to maximise the impact and cost-effectiveness of the actions including multiplier analyses and ways of building influence and relationships in the long-term using different technology channels and platforms. Where relevant, this may include purchase of advertising in the audiovisual media.

For each of the video clips to be produced under task 4.4.2, the contractor will develop a concept note and dissemination plan, including KPIs. Regarding the LIFE Awards videos, or any potential successor, the dissemination plan shall form part of the overall dissemination plan for the event.

For this subtask, tenderers shall submit one unit price per short video clip, covering the conception and dissemination plan for that clip, as set out in the Financial Offer form.

#### **Task 4.4.2 Production**

The contractor shall produce materials, film, edit and produce video clips, teasers, animated films, animated graphics, jingles and other audio-visual material meeting the highest professional quality standards; identify interviewees, coordinate and conduct interviews; research and purchase music and sounds, and manage all copyright-related issues; produce translated versions with subtitles and/or dubbed versions in any of the EU's official languages; encode, edit, convert, compress and optimise audio-visual material in format suitable for online distribution (download or streaming); transpose and reproduce products in appropriate formats, including MPEG1, MPEG2, MP3, MP4, and any other formats for online streaming; optimise audio-visual material for publication on the web and social media, and develop multimedia and interactive functionalities and applications including for mobile devices.

The contractor will be requested to produce up to four video clips per year on programme funding and implementation, approximately 1-2 minutes each, and up to 16 video clips about the finalist projects per year, for the high-level LIFE Awards ceremony or its potential successor, approximately 1-2 minutes each.<sup>72</sup>

It is the contractor's responsibility to make sure the necessary permissions and agreements for producing audio-visual material and filming have been obtained, in order to comply with the Commission's obligation of uploading those materials to Beluga or to the DAM proposed by the contractor and make them available to the general public on the Commission AV Portal.

All videos produced will include a version adapted to social media formats for promotional purposes.

For this subtask, tenderers shall submit one unit price per short video clip, covering the production of that clip, as set out in the Financial Offer form.

---

<sup>72</sup> The contractor shall take into account the requirements listed under Service 4 on the use of AI-generated output

The tenderers shall present in their offer an example of a concept note and dissemination plan for a promotional video of a LIFE Call for proposals.

### Task 4.4.3 Supporting materials

Upon request from the Contracting Authority, the contractor shall conceive and produce supporting training or awareness raising materials for relevant LIFE stakeholders such as communication toolkits, interactive tools, infographics, video tutorials<sup>73</sup>, etc.

#### Subtask 4.4.3.a Video tutorial

The contractor may be requested to prepare one or more video tutorials explaining specific communication or programme-related topics identified by the Contracting Authority.

For this subtask, tenderers shall submit one unit price per video tutorial, as set out in the Financial Offer form

#### Subtask 4.4.3.b Communication toolkit

The communication toolkit shall provide grant beneficiaries with detailed information and guidance on how to communicate effectively about grant activities and results. It shall be developed in an intuitive and user-friendly way, ready-to-use format. It may comprise editable visuals, PowerPoint presentations, a list of best communication practices and other documents.

For this subtask, tenderers shall submit one unit price per communication toolkit, as set out in the Financial Offer form.

The tenderers shall detail in their offer how they will perform each task above. In particular, the tenderers will explain how they will keep abreast of communication activities of ongoing LIFE grants and how they will organise the provision of advice on communication best practices to grant beneficiaries.

### Indicative workload linked to task 4.4, for four years:

Tasks	Estimated workload per unit output in working days (wd)	Timeline	Indicative number of units likely to be requested (for 4 years)	Output expected
4.4.1 Conception and dissemination strategy	2 wd	Upon request of the Contracting Authority	80	Concept note and dissemination plan of short video clips
4.4.2 Production	6 wd		80	Short video clips

<sup>73</sup> For example, video tutorials on project management issues such as LPIs

4.4.3.a Supporting material	10 wd	Deadline to be set by the Contracting Authority	4	Video tutorial
4.4.3.b Supporting material	7 wd	30 calendar days after request from the Contracting Authority	2	Communication toolkit

#### **Task 4.5 – Events and promotional material**

It should be noted that most of Task 4.5 related activities are limited to the logistic organisation of events. When needed, the monitoring team and the communication team will have to work closely to ensure good coordination of the relevant tasks leading to successful events.

The tenderers will detail in their offer how they will ensure the coordination for each of the event-related tasks described below.

The contractor shall contribute to:

a) the organization and the promotion of a range of events organised directly by the LIFE Programme or potential post-2027 successor funding instruments in the fields of activity listed in point b at the start of section 1.4.1, throughout the year (such as LIFE Awards ceremonies, welcome meetings, training sessions, EU Info Day, webinars, platform meetings, matchmaking events, media events etc.), according to the [Guidelines on organising sustainable EC meetings and events](#); and

b) the identification of highly visible third-party events related to the areas of activity under the scope of the LIFE Programme, for which the contractor would organise the Programme contribution and attendance with the aim to promote funding opportunities and grant results.

For each of the programme events under Task 4.5.3, the contractor shall draft and compile proceedings including presentations, visuals, produced material etc. in English and – where applicable – in the language(s) of the host country; disseminate proceedings, results, speeches and presentations.

For each event, the contractor shall use and update, when necessary, the events guidelines and checklists developed under the lead of the Contracting Authority.

##### **Task 4.5.1 Events calendar**

The contractor shall identify annually (usually in March) 15 to 20 highly visible events such as conferences, trade fairs and other events dealing with the thematic areas covered by the LIFE programme, based on thematic and geographical criteria provided by the Contracting Authority. Particular attention shall be given to events taking place in EU Member States with a low uptake of funding, including cost-benefit analysis set up and maintain an events calendar in cooperation with the Contracting Authority. Around six months after delivery of the initial list, the contractor may be requested to provide further suggestions.

#### **Task 4.5.2 Participation in third-party events**

The contractor shall support the Contracting Authority in the participation at events such as conferences, fairs and exhibitions organised by third parties, like Pollutec or Green Transition Forum.

This support shall include research, propose approaches and develop innovative concepts for the participation of grant beneficiaries, representatives of the European institutions and other relevant stakeholders in such events according to the specific context and target audience, for example round tables, side events, matchmaking and networking sessions or workshops.

For any third-party event, the communication team of the contractor shall:

- Provide a detailed planning of operations, on the basis of a checklist.
- Support with the logistical arrangements for the programme participation, including registration, choice of the stand/package, technical equipment needed, stand decoration if applicable.
- Cover registration costs including speaking slot within the event's programme.
- Ensure regular event-specific communication by email and phone with the Contracting Authority staff in charge of the event. This includes an initial planning meeting and regular updates on the organisation and follow-up of the event, including minutes of preparatory meetings held. The Contracting Authority may request short email updates at any time and in this case, the response time should not exceed three working days.
- Facilitate the participation of grant beneficiaries as speakers in sessions organised by third parties or through their presence in a stand, if applicable.
- Liaise with selected grant beneficiaries, event organisers and National Contact Points, following instructions by and upon agreement with the Contracting Authority, to facilitate beneficiaries' participation.
- Manage all invitations, personalised when requested by the Contracting Authority, including compliance with GDPR.
- Arrange shipment of the relevant promotional materials; produce a press kit to distribute to accredited journalists; prepare a page or profile on the event's website.
- Prepare and publish an event notice prior to the event, a post-event article, plus social media coverage (social media coverage is to be performed by the Community manager working as intra-muros, see Task 4.3.3).
- Manage any unexpected logistical and technical needs throughout the event.
- Organise a lessons learned meeting with the Contracting Authority, with a feedback report including lessons learned, no later than three weeks after the event.
- Prepare a final report. The draft final report of the event shall be delivered to the Contracting Authority no later than one month after the event, and the final version after receiving the Contracting Authority's feedback shall be delivered within 2 weeks. See template of the final report structure in Annex 7.

In addition, if the participation involves a stand, the contractor shall cover the costs for a fully equipped stand - including furniture (chairs, tables, carpet), technical equipment (TV screen, plugs, racks), stand counter decoration and stand walls decoration - plus advertising/printing costs, plus 5 event tickets for people that will be in the stand and if required catering for those people. The contractor shall as well gather, during the event, through a feedback survey, feedback from visitors to the stand.

Depending on the stand's size, one of the following items in Annex 6 (Financial Offer) will apply:

- Task 4.5.2.a large stand (>24m<sup>2</sup>)
- Task 4.5.2.b medium-size stand (12-24m<sup>2</sup>)
- Task 4.5.2.c small stand (<12 m<sup>2</sup>)
- Task 4.5.2.d no stand

Upon request from the Contracting Authority, the contractor shall in addition send one member of the communication team to attend all or part of the event, who shall provide on-site assistance and information to visitors including on funding opportunities and successful grants. This on-site presence shall be covered with the item "Tasks 4.5.2 and 4.5.3 - Costs related to the on-site presence of 1 contractor's staff working on logistics and communications" in Annex 6 (Financial Offer). This item covers all costs related to the presence of 1 contractor's staff working on logistics and communications (namely not technical monitors) for 3 days at a physical event outside of Brussels and within the EU or countries associated to the LIFE Programme, including travel and accommodation. Where the required presence at the event is for a period shorter or longer than 3 days, remuneration shall be adjusted in proportion to the actual length of the presence at the event.

Upon request from the Contracting Authority, the contractor shall support the participation of the LIFE Programme or of potential post-2027 successor funding instruments in the fields of activity listed in point b at the start of section 1.4.1, in events, for example corporate events, including by covering the related participation costs, such as booths and stands, without the attendance of the contractor's staff at the event.

### **Task 4.5.3: Support to the delivery of Programme events**

The contractor shall support the development of concepts for events organised by the Contracting Authority, such as the current LIFE Awards ceremonies, welcome meetings, training sessions, EU Info Days, webinars, platform meetings, matchmaking events and media events.

The services to be performed under Task 4.5.3 shall be remunerated in accordance with the sub-tasks set out in Annex 6 (Financial Offer), namely:

- sub-task 4.5.3.a, covering support to the organisation of Welcome Meetings for standard action projects (SAPs), priced per Welcome Meeting;
  - It includes 2 variants, one for which the thematic sessions are physical (default case, 4.5.3.a.1), and one for which the thematic sessions are virtual (unlikely alternative, 4.5.3.a.2). In table B of the Financial Offer (volume hypothesis) it is assumed that only the first case will take place.

- sub-task 4.5.3.b, covering support to the organisation of Welcome Meetings for strategic projects (STRATs), priced per Welcome Meeting;
- sub-task 4.5.3.c, covering support to the organisation of CET contractor's meetings, priced per meeting;
- sub-task 4.5.3.d, covering support to the organisation of EU Info Days, priced per edition of EU Info Days;
- sub-task 4.5.3.e, covering support to the organisation of LIFE Awards ceremonies, priced per edition of LIFE Awards ceremonies;
- sub-task 4.5.3.f, covering support to other events: covered by the lump sums and daily fees of the most appropriate items listed (see detailed explanations in the description of the sub-task 4.5.3.f below).

The indicative numbers of meetings, participants and preparation periods described below are provided solely to indicate the expected scope and workload of the task.

In addition to the physical and online platform events referred to under Task 3.3, the events below shall be organised:

#### **4.5.3.a) Welcome Meetings for standard action projects (SAPs)**

Each year, the contractor will contribute to the organisation of Welcome Meetings gathering all newly selected SAPs or their post-2027 successor grants in the fields listed in point b at the start of section 1.4.1, currently 130 to 150 projects, including also PLP and TA-R projects from the same call, and STRAT projects from the previous call, as well as beneficiaries of existing open projects who want to receive a refresher on applicable rules and procedures. Welcome meetings are considered the first milestone of the monitoring work as described in Task 2.3 'Participating in Welcome Meetings'. Thus, the contractor shall involve in their preparation, among other key actors, both monitoring and communication experts.

As mentioned in Task 1.3.d, Welcome Meetings will have a two-fold objective: (i) presentation and discussion around projects' technical scopes, policy impacts and sustainability and replication aspects, and sharing of best practices, in thematic sessions, and (ii) provision of the main administrative and financial information needed for smooth implementation of their projects from day-one including on communication matters, in plenary horizontal sessions.

Horizontal sessions are typically online and span through three to four half days. Projects financed in previous years are invited as well to join the horizontal sessions, as a refresher, so for some sessions the audience may surpass 1000 people.

Thematic sessions are held by default in person in Brussels but might also be organised online, at the request of the Contracting Authority. The projects are grouped by call topic, currently SAP-CEQL, SAP-CLIMA and SAP-NAT, resulting in three thematic sessions, each lasting from half a day to one day and with 100 to 160 participants. Within each topic projects are further divided into thematic sub-groups. In a given year, there are up to 15 thematic subgroups.

The contractor shall ensure the overall coordination of the events and prepare all necessary technical and communication material. The contractor, besides the activities described under Tasks 1.3.d and 2.3, shall:

- Provide a detailed planning of operations, on the basis of a checklist.

- Provide an excel list of the projects that shall be invited to each of the horizontal and thematic sessions, including potential revised versions after feedback provided by the Contracting Authority.
- Ensure regular event-specific communication by email and phone with the Contracting Authority staff in charge of the event. This includes an initial planning meeting and regular updates on the organisation and follow-up of the event, including minutes of preparatory meetings held. The Contracting Authority may request short email updates at any time and in this case, the response time should not exceed three working days.
- Liaise with selected project beneficiaries, following instructions by and upon agreement with the Contracting Authority, to facilitate their participation.
- Manage all invitations, personalised when requested by the Contracting Authority, and registrations in accordance with EC requirements, including compliance with GDPR.
- Ensure the smooth running of the event until its conclusion, managing any unexpected logistical and technical needs throughout the event.
- Distribute LIFE flags and pins to the project representatives.
- Launch a satisfaction survey among participants in accordance with EC requirements in view of improving the quality of future events, preparing a short summary of the results and suggesting follow up actions. The survey should be launched at the end of the event for both the horizontal and thematic sessions, unless otherwise specified by the Contracting Authority.
- Send to the participants the relevant “participants packages” linked to horizontal and thematic sessions for which they registered, latest one week after the event, including presentations, publications, and other materials presented during the event.
- Organise a lessons learned meeting with the Contracting Authority, with a feedback report including lessons learned, no later than three weeks after the event.
- Provide an online platform for the online meeting and registrations, and for physical thematic sessions provide shipping of materials, venue with capacity to host up to 6 simultaneous (and potentially hybrid) sessions, catering, badges, technical equipment such as screens, projectors (beamers), computers or laptops, lighting, audiovisual equipment, sound amplification systems, stationary equipment and flip charts, as well as fixed and mobile microphones.

It also entails the respect of the following key deadlines:

- Venue booking and defining the logistics: at least six months before the event
- Select an online platform for the online meeting and registrations: at least six months before the event
- Prepare customised registration forms: at least three months before the event
- Opening of registrations: at least two months before the event
- Logistics elements, including badges, catering, material, rehearsals and tests to be approved at least two weeks before the event.

#### **4.5.3.b) Welcome Meetings for strategic projects (STRATs)**

Each year, the contractor will contribute to the organisation of a Welcome Meeting gathering all newly selected strategic projects or their post-2027 successor grants in the fields listed in point b at the start of section 1.4.1. The objectives are similar to those of the SAPs Welcome Meetings, with an emphasis on the specificities of the strategic projects, in particular their role in promoting the coordination with and mobilisation of others EU funds and involving stakeholders relevant for the implementation of the plans and strategies targeted by those projects.

Considering the current estimated number of new strategic projects every year, between 8 and 15, the event is expected to last between two and four half-days and, by default to be organised online, although it may be held in person at the request of the Contracting Authority. Speakers from a limited number of ongoing projects are also invited.

The contractor shall ensure the overall coordination of the events and prepare all necessary technical and communication material. This shall include coordinating the processing of projects data, in compliance with GDPR, to provide an overall analysis. The contractor shall also support the work during the meetings themselves, for example by providing presentations, facilitating discussions, and shall ensure appropriate communication with event's participants and publicity of the event through LIFE social media and web channels.

The contractor shall provide all the necessary online and if applicable on-site logistical arrangements for the Welcome Meeting. Following the meeting the contractor shall prepare a report including a section on lessons learned and recommendations as well as an analysis of the participants' assessments.

The contractor, besides the activities described under Tasks 1.3.d and 2.3, shall:

- Provide a detailed planning of operations, on the basis of a checklist.
- Provide an excel list of the projects that shall be invited to each of the sessions, including potential revised versions after feedback provided by the Contracting Authority.
- Ensure regular event-specific communication by email and phone with the Contracting Authority staff in charge of the event. This includes an initial planning meeting and regular updates on the organisation and follow-up of the event, including minutes of preparatory meetings held. The Contracting Authority may request short email updates at any time and in this case, the response time should not exceed three working days.
- Liaise with selected project beneficiaries, following instructions by and upon agreement with the Contracting Authority, to facilitate their participation.
- Manage all invitations, personalised when requested by the Contracting Authority, and registrations in accordance with EC requirements, including compliance with GDPR.
- Ensure the smooth running of the event until its conclusion, managing any unexpected logistical and technical needs throughout the event.
- Launch a satisfaction survey among participants in accordance with EC requirements in view of improving the quality of future events, preparing a short summary of the results and suggesting follow up actions. The survey should be launched at the end of the event, unless otherwise specified by the Contracting Authority.

- Send to the participants the “participants package, latest one week after the event, including presentations, publications, and other materials presented during the event.
- Organise a lessons learned meeting with the Contracting Authority, with a feedback report including lessons learned, no later than three weeks after the event.
- Provide an online platform for the online meeting and registrations.

It also entails the respect of the following key deadlines:

- Select an online platform for the online meeting and registrations: at least three months before the event
- Prepare customised registration forms: at least 2.5 months before the event
- Opening of registrations: at least two months before the event

#### **4.5.3.c) Clean Energy Transition (CET) contractors’ meetings**

LIFE CET contractors’ meetings are invitation-only events and workshops where the agenda will be defined by the Contracting Authority in terms of content. Each year, the Contracting Authority will indicatively organise four such contractors’ meetings for LIFE CET grants or their post-2027 successor grants.

Each event will last up to 1.5 days, gathering 50 to 80 participants. The meetings should in principle be held in person in Brussels, unless requested otherwise by the Contracting Authority. They may however be held online or in hybrid format at the request of the Contracting Authority.

The contractor will ensure relevant support in line with Task 4.5.3 and in coordination with the Contracting Authority. Specific support required for the contractors’ meeting includes:

- a) an initial planning meeting organised at least one to three months before the event.
- b) arranging travel and accommodation, including covering the related costs, for up to 10 participants and speakers.

Regarding travel and accommodation for invited participants, the arrangements shall be suitable for professional participants and subject to the prior approval of the contracting authority before confirmation of bookings. Accommodation shall be provided in single rooms in hotels of at least three-star standard or equivalent, unless otherwise approved in writing by the contracting authority. Air travel shall be in economy class, using direct flights where reasonably available and proportionate in terms of cost. The contracting authority may reject proposed travel or accommodation arrangements that do not meet these requirements or are otherwise unsuitable in terms of quality, location, timing or travel duration.

#### **Deliverables and deadlines:**

Agenda, presentations, and a satisfaction survey all due two weeks after the event

### Resources required for this task:

The total level of effort is estimated at 10 days of work per event

#### **4.5.3.d) EU Info Days about Calls for proposals**

##### EU Info Days

The EU Info Days is an important event consisting of up to four days of virtual webinars, professionally web-streamed on platforms chosen in agreement with the Contracting Authority, with the exact dates to be determined according to the publication date of the corresponding Call for proposals.

The audience is large, up to 5000 people.

The event's purpose is to promote the most recent calls for applications funded by the LIFE Programme or post-2027 successor funding instruments in the fields of activity listed in point b at the start of section 1.4.1, through information sessions, complemented by question and answers sessions.

The contractor shall:

- Provide a detailed planning of operations, on the basis of a checklist.
- Ensure regular event-specific communication by email and phone with the Contracting Authority staff in charge of the event. This includes an initial planning meeting and regular updates on the organisation and follow-up of the event, including minutes of preparatory meetings held. The Contracting Authority may request short email updates at any time and in this case, the response time should not exceed three working days.
- Manage all invitations, personalised when requested by the Contracting Authority, and registrations in accordance with EC requirements, including compliance with GDPR.
- Prepare and ensure external communication, onsite assistance and management of any software required to ensure audience interaction, such as sli.do.
- Provide logistical support, including the website design and the registration tool, as well as technical and digital support for the provision of a networking tool, the collection of pictures and videos during the event, and any other follow-up actions requested by the Contracting Authority, for example making event material available to participants.
- Ensure the smooth running of the event until its conclusion, managing any unexpected logistical and technical needs throughout the event.
- Launch a satisfaction survey among participants in accordance with EC requirements in view of improving the quality of future events, preparing a short summary of the results and suggesting follow up actions. The survey should be launched at the end of the event, unless otherwise specified by the Contracting Authority.
- Organise a lessons learned meeting with the Contracting Authority, with a feedback report including lessons learned, no later than three weeks after the event.

The contractor will have to fulfil specific requirements of the subprogrammes and grant strands and, where applicable, implement a differentiated approach, for example a plenary session and parallel sessions per topic. The possibility of pre-recorded presentations shall also be considered. The format shall include the option to webstream.

#### Deliverables and deadlines:

- No later than four months before the event: kick-off meeting to set the provisional dates, event agenda, responsible contact persons, platform for the registration and for bilateral virtual meetings among participants.
- No later than three months before the event: planning of preparatory meetings, provision of all materials in coordination with the communication team, including the PowerPoint template and background for speakers, and coordination for the pre-recording and uploading of thematic sessions, where applicable.
- No later than two months before the event: the web-tool for registration and for bilateral virtual meetings shall be accessible to potential participants.
- During the event: organisation of test sessions with all speakers, streaming of live sessions, and management of slido Q&A and poll sessions.
- Within 4 working days after the event: presentations and recordings shall be made available on the platform, on the Contractor's website and on the LIFE YouTube channel.
- Within one week after the event: feedback survey sent to all participants.
- Within two weeks after the event: submission of the draft final report including the results of the feedback survey. Two weeks after receiving the feedback of the Contracting Authority to the draft final report, a final version will be submitted.
- Within four weeks after the event: final debriefing meeting with the Contractor.

#### **4.5.3.e) LIFE Awards**

Another important event for the LIFE programme is the LIFE Awards ceremony where around 400 spectators are usually expected. Each year, the contractor shall support the Contracting Authority in organising this annual ceremony, held around May or June as part of the EU Green Week, together with the related communication activities linked to it.

This task foresees:

Support to the participation of finalists and jury members: the contractor shall support the preparation of the finalists, and the selection of the three high-level jury members, preparing and sending out evaluation packs for jury members and organising a jury meeting.

Update of existing website: the contractor will also update the existing website with the interactive voting system for selecting the Citizens' prize winner (content updates and if necessary technical adaptations) that will be online at least one month before the event.

Ceremony: the contractor shall support the organisation of the Awards ceremony. This shall include, inter alia, preparing a creative concept for the ceremony, providing artistic direction, and proposing and designing entertainment elements such as music, jingles, video clips, dances and TED-style talks etc.

In addition, the contractor shall coordinate with the Green Week organisers, finalise the arrangements with the moderator selected by the Contracting Authority with support from the contractor (and cover his/her fees), coach the finalists and jury members, organise a rehearsal, and prepare input for briefings for jury members and other high-level speakers, such as EU Commissioners. The contractor shall also provide a hostess service to welcome the VIP

speakers and guests, including the Commissioner/s, the Director/s-General and the jury members).

The contractor shall cover the booking of travel and accommodation for three jury members, up to two speakers and project representatives (one or more per project). The contractor shall cover the travel and accommodation costs, for the three jury members, up to two speakers and up to 10 project representatives (one per project). For this 15 people no daily subsistence allowance, nor fee, shall be covered by the contractor.

Regarding travel and accommodation for invited participants, the arrangements shall be suitable for professional participants and subject to the prior approval of the contracting authority before confirmation of bookings. Accommodation shall be provided in single rooms in hotels of at least three-star standard or equivalent, unless otherwise approved in writing by the contracting authority. Air travel shall be in economy class, using direct flights where reasonably available and proportionate in terms of cost. The contracting authority may reject proposed travel or accommodation arrangements that do not meet these requirements or are otherwise unsuitable in terms of quality, location, timing or travel duration.

The contractor will design and produce a short video clip of about 2 minutes on each finalist projects and one for the special prize, if applicable, to be used for promoting the awards ahead of the ceremony as well as for presenting the project finalists during the ceremony. Each video clip shall be made available in different versions: one with English subtitles and up to two with subtitles in the language(s) of the project (to be decided), plus one Instagram version as reel. The videos production is covered by Task 4.4.2.

The contractor shall provide as well, when required by the Contracting Authority, hashtags production and a customer relationship management (CRM) and marketing platform designed for email, SMS, and WhatsApp marketing.

The contractor shall also source any images or videos from projects needed for the production of the videos or for any other promotional purpose of the event. They will be in charge of collecting the necessary forms and ensure copyrights clearance to allow publication on the [AV Portal of the European Commission](#).

The contractor shall also draft a press release announcing the winners including an annex with short descriptions of all the finalists. This press release will be published by EC services. The production of the press release is covered by Task 4.2.3.

#### Deliverables and deadlines:

- planning with contact persons and deadlines to be prepared and agreed with the Contracting Authority no later than five months before the event;
- proposal of an information pack for the jury members and organisation of the jury meeting, where necessary, no later than two month before the event;
- management, updating, hosting and domain purchase of the Awards Citizens' Prize website;
- one update or adaptation of the Citizens' Prize voting tool;
- contracting of the moderator;
- one concept and run-down for the Awards ceremony to be prepared with the moderator and subsequent organisation of the different elements;

- visual identity of the event and any related visuals and animations to be prepared no later than two and one month before the event respectively;
- design and production of trophies;
- draft briefing for jury and speakers, including speeches or speaking points where necessary;
- one draft press releases including annex with, for each finalist, a one-paragraph summary explaining its main achievements, at least one month before the event;
- organization of a cocktail including catering, at the end of the event;
- design of the event invitation, in line with the visual identity, in a format that can be shared by email with internal and external recipients no later than two months before the event;
- preparation and implementation of a dissemination strategy, including proposals for media partnerships to promote the event, and tracking its implementation;
- regular promotion of the event from the date of announcement until the post-event actions are finalised;
- production of a promotional package for the finalists, including guidelines and social media templates;
- organisation of travel and accommodation for the finalists, including their delegation attending the ceremony and for three jury members;
- any Programme-related animation at the stand;
- hostess service to welcome the VIP speakers and guests;
- organisation of a lessons learned meeting with a feedback report including lessons learned, no later than one month after the event.

#### **4.5.3.f) Other meetings/events**

The Contracting Authority may require support from the contractor to organise other unforeseen physical, hybrid or virtual meetings or events, besides those already listed in tasks 3.3 and 4.5.3.

By default, for any such meeting or event, the contractor shall:

- Provide a detailed planning of operations, on the basis of a checklist.
- Provide an excel list of LIFE projects that would be potential candidates to invite, including contact data, including potential revised versions after feedback provided by the Contracting Authority and other EC staff participating in the event.
- Prepare a concept note and agenda, including potential revised versions after feedback provided by the Contracting Authority and other EC staff participating in the event. See template of the concept note structure in Annex 7.
- Ensure regular event-specific communication by email and phone with the Contracting Authority staff in charge of the event. This includes an initial planning meeting and regular updates on the organisation and follow-up of the event, including minutes of

preparatory meetings held. The Contracting Authority may request short email updates at any time and in this case, the response time should not exceed three working days.

- Liaise with selected grant beneficiaries and other external stakeholders, following instructions by and upon agreement with the Contracting Authority, to facilitate beneficiaries and stakeholders' participation.
- Assist grant beneficiaries which have been selected as speakers by preparing interventions and presentations based on European Commission policy priorities.
- Manage all invitations, personalised when requested by the Contracting Authority, and registrations in accordance with EC requirements, including compliance with GDPR.
- Prepare and publish an event notice prior to the event, a post-event article, plus social media coverage (social media coverage is to be performed by the Community manager working as intra-muros, see Task 4.3.3).
- Ensure the smooth running of the event until its conclusion, managing any unexpected logistical and technical needs throughout the event.
- Launch a satisfaction survey among participants in accordance with EC requirements in view of improving the quality of future events, preparing a short summary of the results and suggesting follow up actions. The survey should be launched within one day after the end of the event, unless otherwise specified by the Contracting Authority.
- Send to the participants a "participants package" latest one week after the event, including presentations, publications, and other materials presented during the event.
- Organise a lessons learned meeting with the Contracting Authority, with a feedback report including lessons learned, no later than three weeks after the event.
- Prepare a final report, including social media statistics and analysis, using Contracting Authority's KPIs to assess success at reaching targets. The draft final report of the event shall be delivered to the Contracting Authority no later than one month after the event, and the final version after receiving the Contracting Authority's feedback shall be delivered within 2 weeks. See template of the final report structure in Annex 7.

On top of that, the contractor shall:

- For a physical meeting or event: provide registration platform, shipping of materials, venue with capacity to host up to 4 simultaneous sessions, catering, badges, technical equipment such as screens, projectors (beamers), computers or laptops, lighting, audiovisual equipment, sound amplification systems, stationary equipment and flip charts, as well as fixed and mobile microphones.
- For an online meeting or event: provide registration platform, and digital hosting for up to 5 days, including recording, chat, reactions, polls, and Q&A, possibly using tool like sli.do. With the simultaneous sessions if so requested by the Contracting Authority.

Once the concept and dates of the event are defined, the contractor shall provide an estimate of the working days required to implement the tasks listed above, that shall be validated by the Contracting Authority.

The costs of such support shall be covered as follows (see Annex 6 - Financial Form):

- Sub-task 4.5.3.f.9 shall cover in all cases the costs of communication and logistics staff support (preparation, implementation and post-event tasks), excluding costs linked to on-site presence.
- For physical or hybrid events:
  - Costs related to the on-site presence of 1 contractor's staff working on logistics and communications for 3 days at a physical event outside of Brussels shall be covered with the item „Tasks 4.5.2 and 4.5.3 Costs related to the on-site presence of 1 contractor's staff working on logistics and communications“. Where the required presence at the event is for a period shorter or longer than 3 days, remuneration shall be adjusted in proportion to the actual length of the presence at the event.
  - Task 4.5.3.f.10 shall cover costs linked to registration platform, shipping of materials, venue, catering, badges, for 1 day or 2 half days and up to 100 participants, with capacity to host up to 4 simultaneous sessions. Where the period concerned is shorter or longer than 1 day or 2 half days, and/or the number of participants is larger or smaller than 100 participants, remuneration shall be adjusted in proportion to the actual duration and actual number of participants.
- For online events, the costs linked to IT logistics shall be covered with one of the following sub-tasks, as applicable:
  - 4.5.3.f.1: covers registration platform, and digital hosting for up to 5 days, for up to 100 participants, with recording, chat, reactions, polls, and Q&A, possibly using tool like sli.do. No simultaneous sessions.
  - 4.5.3.f.2: covers registration platform, and digital hosting for up to 5 days, for up to 100 participants, with recording, chat, reactions, polls, and Q&A, possibly using tool like sli.do. With simultaneous sessions.
  - 4.5.3.f.3: covers registration platform, and digital hosting for up to 5 days, for 101-499 participants, with recording, chat, reactions, polls, and Q&A, possibly using tool like sli.do. No simultaneous sessions.
  - 4.5.3.f.4: covers registration platform, and digital hosting for up to 5 days, for 101-499 participants, with recording, chat, reactions, polls, and Q&A, possibly using tool like sli.do. With simultaneous sessions.
  - 4.5.3.f.5: covers registration platform, and digital hosting for up to 5 days, for 500-999 participants, with recording, chat, reactions, polls, and Q&A, possibly using tool like sli.do. No simultaneous sessions.
  - 4.5.3.f.6: covers registration platform, and digital hosting for up to 5 days, for 500-999 participants, with recording, chat, reactions, polls, and Q&A, possibly using tool like sli.do. With simultaneous sessions.
  - 4.5.3.f.7: covers registration platform, and digital hosting for up to 5 days, for 1000-5000 participants, with recording, chat, reactions, polls, and Q&A, possibly using tool like sli.do. No simultaneous sessions.
  - 4.5.3.f.8: covers registration platform, and digital hosting for up to 5 days, for 1000-5000 participants, with recording, chat, reactions, polls, and Q&A, possibly using tool like sli.do. With simultaneous sessions.

The item Tasks 4.5.2 and 4.5.3 Costs related to the on-site presence of 1 contractor's staff working on logistics and communications“ in Annex 6 shall be used as well to cover the costs linked to communication and logistics support to online platform meetings (described under task 3.3.b).

The tenderer shall include all costs in the financial offer to be submitted with the tender. No extra costs will be reimbursed separately under this Framework Contract.

#### **Task 4.5.4 Promotional material and translations**

##### Promotional material

The contractor shall, upon request from the Contracting Authority, design and produce promotional items, gadgets, stands, visual displays, roll-ups, banners, flags, stickers and other advertising material, for example for publication in the press or for a presentation at a conference, ensuring that these materials are branded and produced in a sustainable way, in line with EMAS (Eco Management and Audit Scheme) guidelines and or Green Public Procurement requirements. The contractor shall produce and deliver promotional items such as preparing video screens to showcase in a loop a carousel of existing videos about the LIFE programme or its projects.

The contractor shall be responsible for distribution and shipping of these promotional materials to grant beneficiaries, in particular flags and stickers, to be done during SAP Welcome Meetings (task 4.5.3.a) and upon specific requests from project beneficiaries.

In line with the aim of diminishing printing materials, the contractor shall provide electronic interactive device(s) to facilitate access to promotional material on the Programme and grants information at events.

The contractor shall also be responsible for reprinting or re-sending for production previously produced materials, for which the Contracting Authority has already provided the contractor with the original files and therefore no design work is needed.

The contractor shall organise, upon request from the Contracting Authority, the pick-up and delivery to and from Contracting Authority's premises of promotional items, both in case of new orders and in case of events.

Depending on the promotional material, the most suitable lump sum shall be use to cover the costs linked to its design, production and delivery/shipment:

- Task 4.5.4.a: Printing of materials (excluding business cards). Where the amount concerned is smaller or larger than 100 pages DIN A4, remuneration shall be adjusted in proportion to the actual amount of pages.
- Task 4.5.4.b: Business cards. Where the amount concerned is smaller or larger than 100 business cards, remuneration shall be adjusted in proportion to the actual amount of business cards
- Task 4.5.4.c Production of promotional pens, pins, stickers or similarly priced promotional items. Where the amount concerned is smaller or larger than 100 pens, pins, stickers or similarly priced promotional items, remuneration shall be adjusted in proportion to the actual amount of pens, pins, stickers or similarly priced promotional items.

- Task 4.5.4.d Production of promotional bags. Where the amount concerned is smaller or larger than 100 bags, remuneration shall be adjusted in proportion to the actual amount of bags.
- Task 4.5.4.e Production of LIFE flags. Where the amount concerned is smaller or larger than 100 flags, remuneration shall be adjusted in proportion to the actual amount of flags.
- Task 4.5.4.f: Production of roll-up or banner.

The contractor shall provide storage premises (at contractor or external premises) to stock all the existing and future promotional material and be responsible for the management of the stock. Such cost shall be embedded in the fees of communication and logistics staff in task 4.5.3.

### Translations

The contractor shall cover translation costs in one of two ways:

- For tasks for which translations are foreseen and mentioned in this terms of reference, like tasks 4.2.4 and 4.5.3.e, the translation costs shall be covered within the lump sum of that task.
- Otherwise the translation cost shall be covered with the lump sum of task 4.5.4.g Translation costs. This task includes translation from English to any EU language, or vice versa. When the length of the translation is longer or shorter than 1000 words, remuneration shall be adjusted in proportion to the actual number of words to be translated.

The tenderers shall detail in their offer how they would organise communication support to project beneficiaries participating in high-visibility events.

The tenderers shall provide details in their offer for five high-visibility events organised by third parties, detailing why they would be important for the promotion of the LIFE programme calls for application as well as for the dissemination of LIFE projects results, which format should be used for the presence (virtual, physical, hybrid), which resources would be involved.

The tenderers shall provide in their offer eco-friendly innovative approaches for the LIFE programme to participate in events, with high impact on the target audience whilst at the same time respecting the core LIFE programme objectives.

### **Indicative workload linked to task 4.5, for four years:**

<b>Tasks</b>	<b>Estimated workload per unit output in working days (wd)</b>	<b>Timeline</b>	<b>Indicative number of units likely to be requested (for the 4 years)</b>	<b>Output expected</b>
4.5.1 Events calendar	8 wd	List to be provided usually in March	4	List of 15-20 high-visibility events

				organised by third parties
	5 wd	List of further events to be provided usually in September	4	Updated event calendar
4.5.2 Participation in third-party events – full support (corresponds to tasks 4.5.2.a, 4.5.2.b and 4.5.2.c in Financial Offer annex)	16 wd	In relation with events schedule	90	Conception and delivery of participation to third party events of the Programme and grant beneficiaries, including report on event proceeding.  The estimated 16 wd include 4 wd corresponding to attendance of staff of communication team.
4.5.2 Participation in third-party events – simplified support (corresponds to task 4.5.2.d in Financial Offer annex)	5 wd		20	Support for participation in small scale third party events in cases where a full service is not required - e.g., when no stand visual identity is needed or when no grants are to be invited. Conception and delivery of event including report on event proceeding.
4.5.3.a Support to the delivery of Programme events - Welcome Meetings for SAPs	60 wd		4	Conception and delivery of Welcome Meetings for SAPs including report on event proceeding.
4.5.3.b Support to the delivery of Programme events - Welcome	15 wd		4	Conception and delivery of Welcome Meetings for strategic projects including

Meetings for STRATs				report on event proceeding.
4.5.3.c Support to the delivery of Programme events - CET contractors' meetings	10 wd		16	Conception and delivery of Clean Energy Transition (CET) contractors' meetings including report on event proceeding.
4.5.3.d Support to the delivery of Programme events - EU Info Days	30 wd	Preparatory works shall start approximately 3 months ahead of the event	4	Conception and delivery of EU Info Days including report on event proceeding.
4.5.3.e Support to the delivery of Programme events - LIFE Awards	100 wd	Preparatory works shall start approximately 6 months ahead of the ceremony	4	Conception and delivery of high-level LIFE Awards ceremony including report on event proceeding.
4.5.3.f Support to the delivery of Programme events - other meetings / events	15 wd (online events) 40 wd (physical / hybrid events)	Preparatory works shall start at least 4 months ahead of the event	8 online events 1 physical / hybrid event	Conception and delivery of event including report on event proceeding.
4.5.4 Promotional material and translations	20 wd	Following ad-hoc requests from the Contracting Authority	4	Conception and production of new promotional items, gadgets, stands, visual displays, roll-ups, banners, flags, stickers, and re-printing/re-production of already existing ones where the original files is available.

### **General observations regarding the indicative workload tables**

The indicative workload tables included throughout the description of the services 1-4 above below list all the tasks that may be assigned to the contractor's experts under each service. For each task, an indicative workload per unit of output is provided to enable the tenderers to

prepare a financial offer. An indicative number of tasks is provided either per year or for the four-year maximum duration of the framework contract.

The exact number of units to be requested for each (sub)task shall be determined on the basis of the actual needs at the time of the specific request for services.

Only services and tasks falling within the scope of these tender specifications may be requested under the framework contract. In exceptional cases, where outputs are not expressly identified in the workload tables, the specific request for services may further define the format of an output needed for the performance of a listed task, to be priced on the basis of the framework price list.

#### 1.4.2.3. Other requirements for the performance of the service

##### **Environmental impact of the service, including deliverables**

In light of the *Contracting Authority's* Environmental Policy and the latest Communication to the Commission *Greening the Commission* C(2022)2230 final <sup>(74)</sup> , while conceiving their methodology, the tenderers are invited to demonstrate how their project will contribute to reduce the environmental impact of their tasks and deliverables.

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.

<sup>(74)</sup> for more information, visit: [https://commission.europa.eu/about-european-commission/organisational-structure/people-first-modernising-european-commission/people-first-greening-european-commission\\_en](https://commission.europa.eu/about-european-commission/organisational-structure/people-first-modernising-european-commission/people-first-greening-european-commission_en)

## *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.

## *Web-sites to be hosted on EUROPA domain*

All Commission websites, tools and online applications must be hosted on the europa.eu domain and respect the rules, guidelines, templates and legal provisions outlined in the Europa Web Guide and the use of EC visual identity.

Please check the [Commission policy for web publication](#) for full details.

## **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.9 and II.13 of the draft service contract).

### 1.4.3. Performance and quality requirements

Pursuant to Article II.4.2 of the draft framework contract (see Annex 8 to these tender specifications), whereby “*the contractor must provide services of high quality standards, in accordance with the state of the art in the industry and the provisions of this framework contract, in particular the tender specifications and the terms of its tender*”, the contractor shall be responsible for ensuring that each monitoring, communication and close-to-market task, as requested by the Contracting Authority and in accordance with the framework contract, is duly performed. Any failure to comply with this contractual requirement may be considered as ‘unperformed obligations’ as referred to in Article II.16.1 (reduction in price) of the draft framework contract.

The contractor must introduce internal procedures to ensure the quality of the deliverables both in the format and the substance. The contractor shall be **responsible for overseeing the quality of all deliverables** to the Contracting Authority. In particular:

- control of the quality of all assessments provided by the monitoring experts and verification that they are written in accurate and appropriate language (spelling, grammar and style to be duly checked);
- control of the quality of all communication products (web summaries, publications, videos, promotional materials, social media posts, web news...), invitations and other relevant communication linked to events, to ensure clarity and pertinence of texts, and writing in accurate and appropriate language.

“Low quality delivery”, as referred to in Article II.16.1 of the draft framework contract (Annex 8 to these tender specifications), may apply when the quality of a service delivery is such that the objectives for which the service was requested cannot be reached. This includes cases where the contracting authority cannot approve a *result*, as defined in Article II.1 of the General Conditions of the framework contract, after the contractor has submitted the required additional information, correction or new version (see Article II.16.1).

Timely delivery of the services is essential for the contracting authority (see Article II.4.2 of the draft framework contract). Thus, the contractor shall **also ensure that any deadlines, as defined by the Contracting Authority, are strictly respected**. The respect of deadlines for every delivery of the required products/assistance is essential in order to reach objectives, make payments to the grant beneficiaries in due time and for the internal organisation of the Contracting Authority staff. The contractor must accept the deadlines fixed by the Contracting Authority and commit to a punctual delivery. Failure to perform its contractual obligations within the applicable time limits set out in the specific contract(s) and these tender specifications may constitute a case of “liquidated damages for delay in delivery” as referred to in the Article II.15 of the draft framework contract.

Other aspects that may be considered as unsatisfactory performance leading to potential liquidated damages include the following:

- Partial services performance due to insufficient number of personnel or other reasons attributable to the Contractor’s responsibility;
- Unavailability to perform one or more of the services listed in the signed specific contract;
- Failure to comply with the delivery milestones set out in the specific contract;

- Failure to submit an invoice within 60 days after the end of the period of provision of the services;
- Failure to submit a report within the period foreseen in these tender specifications or in the terms of reference for the specific assignment.

The Contracting Authority will monitor yearly the performance of the contractor using the following **indicators**:

- the % of monitoring tasks implemented (the target for the contractor is to address 100% of the monitoring support requests);
- the quality<sup>75</sup> of the monitoring outputs such as monitoring reports and assessment of LPIs (the target is maximum 10 cases per contractual year that needed a revision of the monitoring output due to relevant quality issues);
- the timeliness<sup>76</sup> of monitoring tasks (including a target of 95% of reports linked to project and operating grant payment requests assessed by the contractor within the agreed deadlines);
- the quality of publishable communication outputs (having as target that maximum 5% of publishable communication outputs should need more than two rounds of corrections by the Contracting Authority due to relevant quality issues linked to the work of the contractor's communication team)<sup>77</sup>;
- specific additional quality indicators and indexes will be tracked at the level of Specific Contracts, e.g. for communication and close-to-market outputs/tasks.

The contractor is requested to use an internal system to monitor these indicators.

In addition, to assess the performance of communication activities within Service 4 at the level of each activity (publication, event...), the contractor shall take as a reference the [2022 EC Communication Indicators](#).

The tenderers shall define in their tenders a quality control plan that they propose to adopt for the purposes of providing the services covered by these tender specifications. An effective organisational structure will be required to cover the breadth and depth of knowledge and expertise required. In their proposed quality control plan, tenderers must specify how they intend to manage and ensure high quality and effective monitoring of the services and works they may be required to supply to the Contracting Authority, in accordance with Article II.4.2

---

<sup>75</sup> A monitoring output is considered of sufficient quality if the following conditions are fulfilled: the relevant templates are respected, the sections to be completed within those templates are completed, there are no contradictions in the assessment/conclusions with applicable grant rules and prior guidance provided by the Contracting Authority, the text is written in correct language, and the output(s) are uploaded/sent as per the established procedures.

<sup>76</sup> The contractor must provide its services within deadlines specified by the Contracting Authority, in its service requests and procedures. Those services must meet standards set out in the quality plan proposed by the contractor. Corrections to the deliverables requested by the Contracting Authority need to be carried out by the contractor within the set deadlines. Additional corrections might be requested by the Contracting Authority in case of an obvious deviation from the standards mentioned in the description of the services above.

<sup>77</sup> The Contracting Authority may reject a publishable communication output if, after 2 rounds of corrections by the Contracting Authority due to relevant quality issues linked to the work of the contractor's communication team, the third version provided by the contractor's communication team includes still relevant quality issues preventing the publication of the output.

of the Framework Contract. Ensuring the timely delivery of tasks will be of utmost importance, thus management and organisational aspects, as well as selection of expert staff, must be designed to achieve this.

#### *1.4.4. Deliverables*

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

At the conclusion of each Specific Contract, the Contractor will transfer to the Contracting Authority all source files corresponding to the communication-linked deliverables generated during the execution of the Specific Contract, in particular with regard to editorial, graphic, electronic, technical, IT-related and audio-visual tasks, plus all source files corresponding to the delivery of studies, policy briefs and reports under Service 3.

The Contractor shall provide all deliverables in the form and format specified in the Specific Contract and shall guarantee their integration into the target informatics environment if applicable. Any material that the Contracting Authority may have shared with the Contractor as background information for delivering products/services on a given topic shall not be further shared or used by the Contractor, unless the Contracting Authority states otherwise in writing. Before proposing new solutions, the Contractor should look at other service carried out under the Framework Contract and reuse and adapt solutions in line with the sound financial management principle (e.g. online satisfaction surveys, feedback forms, etc.).

When requested in the specific contract the report(s) and linked deliverables and documents 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.

#### **Interim report**

The interim report shall be drafted according the instructions given under the specific request for services (detailing tasks performed, outcomes achieved, etc.).

The interim report shall accompany the request for the interim payment, through the submission of an invoice with the applicable percentage specified in each specific contract.

This report shall describe in detail, at least, the work carried out, results obtained, and human and technical resources mobilised. It shall provide an assessment of the progress on the implementation of the specific contract giving details of any divergence from the tasks described in the request for services.

It shall report as well on the compliance with the procedures and the quality criteria (in particular the indicators as listed in this document and in the corresponding specific contract).

In particular, the contractor shall include up-to-date information on the number of ongoing grants monitored, number of midterm, interim and final reports assessed, number of project physical visits and of project virtual visits, number of meetings with beneficiaries.

The interim technical report must contain, in annexes, the main outputs delivered when implementing the tasks (including a summary of the monitoring, close-to-market and communication outputs that are available in the IT tools used by the contractor in addition to Butler and the Funding and Tenders Portal).

The interim report prior to a final report shall also provide a justified estimate of the expected budget consumption at final report stage, highlighting main deviations expected until the end of the service contract, compared to the figures in the corresponding specific contract.

### **Final report**

For the final payment, the contractor must draw up a final technical report on the tasks executed in accordance with the instructions given under the specific request for services.

The final report shall be drafted according the instructions given under the specific request for services (detailing tasks performed, outcomes achieved, conclusions and recommendations for improvements, etc.).

The final report shall accompany the request for the payment of the balance, through the submission of an invoice.

In addition to the information included in the interim technical reports as described above, the final technical report shall also contain conclusions and recommendations for improvements and adjustments in the working procedures concerning the monitoring and the general implementation of the LIFE programme, including communication and close-to-market support aspects.

With the final technical report, the contractor must also submit a financial report detailing the number of tasks requested and performed under each service.

Linked to monitoring tasks, the contractor will provide a summary of the tasks performed as well as when relevant the workload assigned to the performance of each specific task carried out under the specific contract.

Linked to communication, the contractor must also submit a financial report that includes a detailed table of the staff that were assigned and delivered each specific task, as well as a description of other items used to perform the tasks under the specific contract with supporting documents where relevant.

### **Intermediate outputs and deliverables**

#### **Late or urgent letters report**

When relevant, the contractor will submit a monthly report listing the grants whereby a quick action is expected from the Contracting Authority. This could be for instance, a feedback following a project visit or the reply on an amendment request.

#### *1.4.5. Contractor's trainings and meetings: responsibilities and coverage of expenses*

The contractor shall be responsible for the logistics of all meetings and training relevant to the services and tasks required by each specific contract and as specified therein. Any expenses related to the organisation of meetings and training shall be covered by the contractor's financial offer i.e. part of the all-inclusive unit prices, task's unit costs or fees etc.

##### **1.4.5.1. Trainings**

The contractor must provide the training programmes necessary to ensure constant high-quality services for the team. The Contracting Authority reserves the right to request the replacement of any member of the team, whose experience and/or competence it deems to be inadequate, stating its reasons. The contractor shall replace personnel in a timely manner and without additional fees.

When new developments occur on the IT tools provided by the Contracting Authority, the contractor will provide internal ad-hoc training to the relevant experts. The contractor shall ensure that its staff is also properly trained when other new developments relevant to the implementation of the tasks in this framework contract occur (e.g. on programme methodologies and procedures, policy updates, Information Technology tools). In particular, the contractor shall ensure that all team members are constantly updated about the latest developments related to the LIFE programme.

Whenever it is necessary to replace or to introduce new experts to carry out the work (e.g. if the grants national repartition or the thematic repartition changes due to specificity of a new call for proposals procedure for action grants) or when new methodologies and procedures are introduced, the contractor shall ensure a proper training for both new and existing experts.

As a rule, the Contracting Authority shall not be responsible for the training of the Contractor's staff. Time spent by the contractor's staff attending trainings shall not be invoiced to the Contracting Authority.

Specialised trainings may be organised by the contractor for experts:

- on market related issues such as assessment of business plan deliverable, or other Close-to Market (C2M) initiative related issues
- on communication

##### **1.4.5.2. Meetings**

Physical meetings are to be held at the contractor's premises or at a venue agreed with the Contracting Authority. For each meeting organised, the agenda will be proposed by the contractor to the Contracting authority which may make adjustments as necessary. The contractor will send the minutes of the meeting within seven (7) calendar days, for the approval of the Contracting Authority. Upon approval from the Contracting Authority, physical meetings may be replaced by virtual meetings or tele-conference.

**Kick-off meeting:** The contractor shall organise one physical "kick-off" meeting with the Contracting Authority in Brussels, within the first month of the signature of the first specific contract, in which members of the Coordination Team should take part, as well as key experts in charge of the overall coordination and support teams.

**Regular progress meetings:** monthly meetings shall be organised between the contractor's General Coordinators and the Contracting Authority to ensure up-to-date coordination, to decide on pending issues to perform their tasks and discuss current matters. They will be held generally virtually, but upon request from the Contracting Authority they may be organised physically at the premises of the Contracting Authority in Brussels.

Problematic cases or situations might exceptionally require additional meetings that may be called upon by the Contracting Authority or the contractor.

**Online inventory meetings** between the monitoring experts and Contracting Authority staff will be organised up to twice a year to briefly review the grants progress, discuss potential implementation issues and related actions to be taken as well as to agree on the planning for the upcoming year. The list of the expected tasks foreseen such as expected payment request, monitoring visit and the main points of discussion of the meeting will be summarised by the monitoring experts and sent to the Contracting Authority staff for approval by the deadline specified by the Contracting Authority. The duration of such meeting which are grant specific is estimated on average to 20 minutes per grant.

**An annual Monitoring Review meeting** will be organised in Brussels by the contractor, who is required to involve at least 70% of the monitoring, communication and C2M experts covering all components of the LIFE programme and geographic regions. The Contracting Authority involved staff will participate in those meetings<sup>78</sup> in person during two days. The meeting will be focused on thematic and policy matters and will also be an opportunity to discuss issues in relation to the implementation of the specific contracts (procedures and working methods in place, feedback on performance possible modifications of the IT tools, etc...).

In addition, the Monitoring Review meeting agenda will include a meeting focused on communication matters, involving all communication experts and with participation of the Contracting Authority, to discuss implementation of communication tasks in Service 4.

The contractor will send a feedback survey to participants latest 3 days after the event, and will provide latest 6 weeks after the event a report including main conclusions, signed participants list, lessons learned, summarised results, suggestions from feedback survey and complete list of monitoring, communication and C2M experts (not only those that attended the event).

The contractor will compare in the report the attendance to the event (based on signed participants list) with the complete list of monitoring, communication and C2M experts.

If attendance is <70% of the monitoring, communication and C2M experts, the lump sum mentioned by the contractor in Annex 6 (Financial Offer) will be reduced in proportion to the % of attendance (e.g. if 60% attendance, the amount will be multiplied by a factor 0.6).

Regarding the coverage of costs linked to these meetings please refer to the remarks at the end of task 1.2.

#### *1.4.6. Content, structure and graphic requirements of publishable deliverables*

The contractor must deliver publishable deliverables as indicated below.

---

<sup>78</sup> The participation of the Contracting Authority may imply the participation of 50 persons.

LIFE publications (see Task 4.2 – Editorial work and design in section 1.4.2.2.4 for a list of them) must include:

- key words to facilitate electronic information retrieval;
- specific identifiers which must be incorporated where requested 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 views of the authors only, and the European Commission or the European Climate, Infrastructure and Environment Executive Agency (CINEA) cannot be held responsible for any use that may be made of the information contained therein.”*

In addition, LIFE publications must follow the Interinstitutional Style Guide<sup>79</sup> and the European Commission visual identity<sup>80</sup>.

### **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 any deliverables produced within the specific contracts, 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](https://european-union.europa.eu/accessibility-statement_en)

### **Graphic requirements**

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

[https://commission.europa.eu/resources/european-commission-visual-identity\\_en](https://commission.europa.eu/resources/european-commission-visual-identity_en)

Additionally any publications must comply with the specific visual identity guidelines of the LIFE Programme [https://cinea.ec.europa.eu/programmes/life/communication-and-gdpr-rules\\_en](https://cinea.ec.europa.eu/programmes/life/communication-and-gdpr-rules_en).

It should be noted that the visual identity guidelines in the 2 links above are applicable as well to other communication elements such as stands or social media visuals.

### **Professional graphic design**

The contractor must apply the rules set out in Visual Identity Manual for the graphic design of both the cover page and the internal pages of publishable deliverables. If applicable, the

---

<sup>79</sup> <https://style-guide.europa.eu/en/home>

<sup>80</sup> [https://ec.europa.eu/info/resources-partners/european-commission-visual-identity\\_en](https://ec.europa.eu/info/resources-partners/european-commission-visual-identity_en)

professional font (EC Square Sans Pro) to be used will be made available to the contractor free of charge upon acceptance of the terms and conditions of its use after contract signature. 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;
- The Contracting Authority's premises:
  - o for some meetings, upon request from the Contracting Authority;
  - o in case of intra muros execution of specific tasks.
- For project visits and events, other locations including the EU, [third countries associated to the LIFE Programme](#) and very rarely, in [overseas countries and territories](#) (estimated fewer than 10 (<10) project visits during the implementation of the FWC).

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

The procedure will result in the conclusion of a single framework contract.

A framework contract (FWC) establishes a mechanism for future repetitive purchases by the Contracting Authority to be awarded in the form of specific contracts<sup>81</sup>. The signature of a framework contract does not impose an obligation on the Contracting Authority to conclude specific contracts with a framework contractor.

The single framework contract will be concluded with one framework contractor. Specific contracts shall be awarded on the basis of the terms laid down in the framework contract, refined or, in duly justified circumstances, supplemented to reflect the particular circumstances of the specific contract. The details are set out in the draft framework contract.

Tenderers need to take full account of the full set of procurement documents, including the provisions of the draft framework contract as the latter will define and govern the contractual relationship 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 framework 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 the Financial Regulation<sup>82</sup> 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 (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

<sup>81</sup> Any reference to specific contracts applies also to order forms (a simplified form of specific contract).

<sup>82</sup> Regulation (EU, Euratom) 2024/2509 of the European Parliament and of the Council of 23 September 2024 on the financial rules applicable to the general budget of the Union (recast) (OJ L, 2024/2509, 26.09.2024, ELI: <http://data.europa.eu/eli/reg/2024/2509/oj>)

all other group members before signing the contract) that the debt(s) may be offset against any payment due under the contract.

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

An indicative estimate of the volumes to be ordered over the whole duration of the framework contract is given in the financial model in *Annex 6*. These volumes are estimates only and there is no commitment as to the exact quantities to be ordered. The actual volumes will depend on the quantities, which the Contracting Authority will order through specific contracts. In any case, the *framework contract ceiling*, i.e. the maximum amount to be spent under the framework contract, shall not be exceeded.

The *framework contract ceiling* is indicated in Section 5.1.5 of the contract notice and below:

The maximum amount of all purchases under the framework contract resulting from this call for tenders is EUR 61 000 000, including all charges, costs and expenses and any renewal period. This maximum amount applies to the entire duration of the framework contract, including the initial period and any renewal period.

During the initial period of 24 months, the cumulative value of specific contracts and order forms signed under the framework contract may not exceed EUR 30 500 000.

If the framework contract is renewed, the amount available during the renewal period shall correspond to the remaining balance of the overall framework contract ceiling, namely EUR 61 000 000 minus the cumulative value of specific contracts and order forms signed during the initial period. Consequently, any part of the EUR 30 500 000 maximum amount available for the initial period that has not been used before the end of that period may be used during the renewal period.

In all cases, the overall maximum amount of EUR 61 000 000 shall not be exceeded. These amounts do not constitute any commitment by the Contracting Authority to order minimum quantities or to use the full ceiling.

**The total price calculated on the basis of Table B must not exceed the maximum estimated value of the framework contract, including renewal. A tender whose total assessment price exceeds this amount will be rejected.**

In case of renewal, the renewal will cover the entirety of the services described in these tender specifications.

During the performance of the framework contract resulting from the current call for tenders, including during any renewal period, and in any event within three years following its signature, the contracting authority may use the negotiated procedure under point 11.1(e) of Annex I to the Financial Regulation to procure new services from the contractor, up to a maximum of 50% of the initial framework contract ceiling. These services would consist in the repetition of similar services entrusted to the contractor and would be awarded under the conditions, and in the order, set out below (see Section 3.4):

- Criterion 1: Working method and organisation of the work and resources;
- Criterion 2: Quality of the proposed methodologies;
- Criterion 3: Quality assurance and quality control and mitigation measures.

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

The framework contract resulting from this call for tenders will be concluded for an initial period of 24 months. The details of the initial contract duration and possible renewals are set out in the draft framework contract.

The FWC may be renewed once for an additional period of 24 months. Renewal is subject to an express written notification by the contracting authority sent to the contractor at least three months before the end of the ongoing duration of the FWC. If the contracting authority does not notify the renewal in writing within that period, the FWC expires automatically at the end of the ongoing duration, without any further formality. The total duration of the FWC, including any renewal, may not exceed 48 months.

Renewal does not change or postpone any existing obligations. Article I.3.5 of the draft FWC (see Annex 8 “Draft framework contract and annexes”) applies to the performance of obligations after the end of the FWC. For the avoidance of doubt, a renewal of the FWC in the sense of Article I.3.6 of the draft FWC does not imply the conclusion of a new FWC but only the extension of the initial duration of the FWC.

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

For all exchanges with the contractor during the implementation of the framework 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 151 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.

### **1.10. Security**

When performing tasks for the Contracting Authority in execution of the contract, the contractor and its personnel shall comply with the Contracting Authority's applicable security requirements.

Any financial burden for complying with the security measures (e.g. security background checks, security clearance etc.) will be entirely at the expense of the contractor and not of the contracting authority.

### **1.11. Other provisions**

#### **1.11.1. Fraud prevention and detection**

The contractor must assist the contracting authority in its efforts on fraud prevention and detection.

The contractor undertakes to impose the fraud prevention obligations upon its subcontractors and personnel in the relevant contracts signed with them. Upon request, the contractor must provide evidence to the contracting authority that those obligations have been included in the relevant agreements with its subcontractors and personnel.

### **1.11.2. Environmental considerations**

Environmental considerations shall be taken into account by the contractor throughout the complete life cycle of providing products or services in the implementation of the FWC.

When applicable, the contractor shall assist the Commission to perform its commitments as set in the EMAS EC Environmental Policy<sup>83</sup> and shall follow EMAS best practices.

### **1.11.3. Equal opportunities**

The contractor shall observe a policy on the promotion of equality and diversity in the implementation of the FWC, by applying the principles of non-discrimination and equality set out in the EU Treaties in full and in their entirety.

In the implementation of the FWC, the contractor shall establish, maintain and promote an open and inclusive working environment which respects human dignity and the principles of equal opportunities, especially through the removal of all obstacles to recruitment and all potential discrimination based on sex, race, colour, ethnic or social origin, genetic features, language, religion or belief, political or any other opinion, membership of a national minority, property, birth, disability, age or sexual orientation.

---

<sup>83</sup> Available at [2022\\_12\\_13\\_Environmental\\_Policy\\_2022\\_adopted\\_by\\_the\\_ESC\\_on\\_4\\_October\\_EN.pdf \(europa.eu\)](#)

## 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 framework contract resulting from this call for tenders through an open procedure pursuant to Article 167(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 the [LIFE Regulation<sup>84</sup> of 29 April 2021 \(Article 9.2\)](#), and the [LIFE Multiannual Work Programme 2025-2027 \(section 5.1\)](#).

### 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) <sup>(85)</sup>, 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 <sup>(86)</sup>.

---

<sup>84</sup> Regulation (EU) 2021/783 of the European Parliament and of the Council of 29 April 2021 on the establishment of a Programme for the Environment and Climate Action (LIFE) and repealing Regulation (EU) No 1293/2013, OJ L 172/53 of 17.5.2021.

<sup>(85)</sup> 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](#).

<sup>(86)</sup> 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.

As the Agreement on Government Procurement<sup>87</sup> concluded within the World Trade Organisation applies, the participation in this call for tenders is also open to all natural and legal persons established in the countries that have ratified this Agreement, on the conditions laid down therein.

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.

Participation in this call for tenders is also open on equal terms to natural and legal persons established in a third country eligible for funding under the programme for the Environment and Climate Action (LIFE), established in [Regulation \(EU\) 2021/783](#).

Third countries negotiating association to the programme will be treated as associated countries provided that the association agreement with the third country concerned applies at the time of the award of the contract. 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.**

<sup>87</sup> [https://www.wto.org/english/tratop\\_e/gproc\\_e/gp\\_gpa\\_e.htm](https://www.wto.org/english/tratop_e/gproc_e/gp_gpa_e.htm).

## 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)<sup>88</sup>. In either case subcontracting is permitted.

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<sup>(89)</sup>.

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*)

---

<sup>88</sup> Each economic operator participating in the joint tender is referred to as “group member”.

<sup>(89)</sup> Only identified subcontractors (see Section 2.4.2) must be specified in the eSubmission application.

### 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 <sup>(90)</sup>.

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:

---

<sup>(90)</sup> 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.

- 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),
- 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 identified subcontractors), tenderers are required to 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 10 % .

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.

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 substantially altered, 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 the 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 <sup>(91)</sup>.

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.

---

<sup>(91)</sup> 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 framework 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 138 of the Financial Regulation.

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

As evidence of non-exclusion, each tenderer <sup>(92)</sup> needs to submit with its tender a **Declaration on Honour** <sup>(93)</sup> in the model available in *Annex 2*. <sup>(94)</sup> 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 <sup>(95)</sup>, 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 framework 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.

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

---

<sup>(92)</sup> See Annex 1 which of the involved entities participating in a tender need to provide the Declaration on Honour.

<sup>(93)</sup> The European Single Procurement Document (ESPD) may not be used yet in European Commission's calls for tenders.

<sup>(94)</sup> 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.

<sup>(95)</sup> 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.

### 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 <sup>(96)</sup>.

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.

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

---

<sup>(96)</sup> 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.

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) <sup>(97)</sup> 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	
<b>Minimum level of capacity</b>	Average yearly turnover of the last two financial years for which the accounts have been closed, shall be above EUR 10 000 000
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, subcontractors and other entities (that are not subcontractors) on whose capacity the tenderer relies to fulfil the selection criteria).
<b>Evidence</b>	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.

---

<sup>(97)</sup> 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	
<b>The tenderer must prove experience in the field of organising and managing services delivered by large groups of at least 25 professionals.</b>	
<b>Minimum level of capacity</b>	At least 1 similar (in scope and complexity) project completed or still ongoing in the last three years preceding the tender submission deadline, which involved organisation and management of a pool of at least 25 experts to deliver certain services in the requested field.
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, subcontractors).
<b>Evidence</b>	<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, and number of experts delivering the services. 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. To allow for possible verifications with the clients, the tenderer is required to provide also a contact point per client (with name, email and phone number).</p>
Criterion T2	
<b>The tenderer must prove experience in the field of environment or climate action.</b>	
<b>Minimum level of capacity</b>	At least 2 projects involving each at least 20 experts from at least 2 EU countries completed or still ongoing in the last five years preceding the tender submission deadline, with a minimum total value of EUR 1 500 000 in the field of environment or climate action. For at least one of these projects, the tenderer must have acted as the lead contractor.
<b>Basis for assessment</b>	This criterion applies to the leader or sole tenderer.
<b>Evidence</b>	<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. To allow for possible verifications with the clients, the tenderer is required to provide also a contact point per client (with name, email and phone number).</p>
Criterion T3	

<b>The tenderer must prove its capacity to implement services in multiple EU Member States<sup>98</sup>.</b>	
<b>Minimum level of capacity</b>	A list of at least one project completed or still ongoing in the last five years preceding the tender submission deadline, where services have been delivered in at least 10 EU Member States. This requirement applies to the projects taken together, not to each project individually.
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, subcontractors).
<b>Evidence</b>	<p>A list of projects meeting the minimum level of capacity. The list shall include details of their title and main activities, start and end date, total project amount, role of implementing entity (leader, partner, subcontractor, etc.) 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. To allow for possible verifications with the clients, the tenderer is required to provide also a contact point per client (with name, email and phone number).</p>
<b>Criterion T4</b>	
<b>The tenderer must prove capacity to draft technical reports and publications in English, and to edit publications in English.</b>	
<b>Minimum level of capacity</b>	The tenderer must have experience in producing (draft and edit) technical reports and publications in English to client/s in the last two years, preceding the tender submission deadline.
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, subcontractors).
<b>Evidence</b>	<p>The tenderer must provide at least 2 documents (1 technical report and 1 brochure), each of them in English, drafted and published or delivered to client/s in the last two years.</p> <p>As supporting evidence the Contracting Authority may request in the case of publications for an URL reference.</p>
<b>Criterion T5</b>	
<b>The tenderer must prove experience in the field of communication and coordination of editorial, design and multimedia content, including handling social media accounts and communication campaigns.</b>	
<b>Minimum level of capacity</b>	At least 3 projects completed or still ongoing in the last three years preceding the tender submission deadline, with a minimum value for each of them EUR 300 000, in the field of communication and coordination of editorial, design and multimedia content, including handling social media accounts and communication campaigns.

<sup>98</sup> EU Member States, including overseas countries and territories (OCTs), and countries associated to the LIFE Programme ([participating countries](#)). See section 1.4.2.2 for a description of the services requested within this tender.

<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, subcontractors).
<b>Evidence</b>	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. To allow for possible verifications with the clients, the tenderer is required to provide also a contact point per client (with name, email and phone number).
<b>Criterion T6</b>	
<b>The tenderer must prove experience in the field of organising large on-site and virtual events.</b>	
<b>Minimum level of capacity</b>	At least 3 large events (of which at least 1 virtual and 1 on site) completed in the last 5 years preceding the tender submission deadline, with a minimum value for each of them EUR 25 000 with at least 80 participants per event. The set of events presented must include events held in at least two different EU Member States.
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, subcontractors).
<b>Evidence</b>	A list of events meeting the minimum level of capacity. The list shall include details of their start and end date, scope, number of participants, role and amount invoiced.  As supporting documents for each project reference the Contracting Authority may request statements issued by the clients and take contact with them. To allow for possible verifications with the clients, the tenderer is required to provide also a contact point per client (with name, email and phone number).

## **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.

The same CV cannot be used to cover multiple profiles.

The contractor shall ensure that the staff members listed in the technical offer are effectively available when the first specific contract is signed.

### ***Criteria for the Coordination and Thematic Support Team***

#### **Criterion P1**

<b>One General coordinator (profile B1)</b>	
<b>Minimum level of capacity</b>	At least 10 years' experience in project management, including overseeing project delivery and quality control of delivered services, in project/s of at least EUR 1 500 000 covering at least 2 EU countries), with experience in management of team of at least 25 people.
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	1 detailed CV, including a list of relevant projects managed, their location, scope and value.  This role can only be covered by one expert, it cannot be split among several.
<b>Criterion P2</b>	
<b>One Process &amp; Quality Manager (profile B2)</b>	
<b>Minimum level of capacity</b>	At least 7 years' professional experience in the field of project monitoring process and quality management.
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	1 detailed CV, including a list of relevant projects managed.  This role can only be covered by one expert, it cannot be split among several.
<b>Criterion P3</b>	
<b>One Communication Coordinator (profile B3)</b>	
<b>Minimum level of capacity</b>	At least 7 years of professional experience as communication director or senior consultant in designing, carrying out and evaluating communication strategies and EU wide communication campaigns, supported by a diploma in the field of communication; or (if no communication diploma) an additional 3 years of experience in a public relations agency or communication consultancy (i.e. at least 11 years of professional experience).  At least 4 years of experience in management of team of at least 5 people. This includes overseeing project delivery, quality control of delivered service, client orientation and conflict resolution experience in project of at least EUR 1 500 000 size covering at least two EU countries.

	<p>Language requirements: the Communication Coordinator must have at least C1 level of English according to the European Framework of Reference for Languages<sup>[1]</sup>.</p> <p><sup>[1]</sup> in the <a href="#">Common European Framework for Reference for Languages</a></p>
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	<p>1 detailed CV, including a list of relevant projects managed and including reference to the relevant higher education degree. An English language certificate proving level C1 or evidence of working in English (having to deliver reports, technical outputs or publications... in English) for at least 10 years.</p> <p>This role can only be covered by one expert, it cannot be split among several.</p>
<b>Criterion P4</b>	
<b>One Close-to-market Services Coordinator (profile B4)</b>	
<b>Minimum level of capacity</b>	<p>Expert in at least one of the following fields: business development, business coaching and mentoring, supporting companies to bring green products, technologies, services and processes into the market.</p> <p>At least 7 years of professional experience (in total) including at least 2 years of experience in coordinating the work of team of at least 5 members.</p> <p>Higher education degree in the field of economy, business management, business administration, or similar fields or equivalent professional experience of 4 years in the same fields (economy, business management, business administration, or similar).</p> <p>At least 6 years' professional experience related to business development/access to market related aspects, in particular with focus on SMEs and start-ups</p> <p>Proven familiarity with EU policies and regulations in the respective field of expertise.</p>
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	<p>1 detailed CV, including a list of relevant activities implemented.</p> <p>This role can only be covered by one expert, it cannot be split among several.</p>

### Criterion P5

#### Three Senior experts in Circular Economy and Environmental Health (profile B5)

<b>Minimum level of capacity</b>	<p>Experts in one of the following fields (at least 5 years' professional experience, out of which at least 3 in the EU): Circular Economy, Environmental Health i.e. Water and seas, Air and Noise, Soil and Chemicals management, Environment Governance and Information.</p> <p>In addition, at least 6 years of professional experience (in total) with at least 1 year of experience in coordinating the work of team of at least 5 members.</p> <p>Higher education degree in the field of environmental engineering, industrial engineering, environmental management, business administration or equivalent professional experience of 4 years in the same fields (environmental engineering, industrial engineering, environmental management, business administration).</p>
<b>Basis for assessment</b>	This criterion applies to the tenderer as a whole, i.e. the combined capacities of all <i>involved entities</i> (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	Detailed CVs of at least 3 experts, globally covering two different fields of expertise

### Criterion P6

#### Three Senior experts in Nature and Biodiversity (profile B6)

<b>Minimum level of capacity</b>	<p>Experts in one of the following fields (at least 5 years' professional experience, out of which at least 3 in the EU): nature protection, ecology or biodiversity.</p> <p>In addition, at least 6 years of professional experience (in total) with at least 1 year of experience in coordinating the work of team of at least 5 members.</p> <p>Higher education degree in the field of natural sciences, biology, ecology or equivalent professional experience of 4 years in the same fields (natural sciences, biology, ecology).</p>
<b>Basis for assessment</b>	This criterion applies to the tenderer as a whole, i.e. the combined capacities of all <i>involved entities</i> (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	Detailed CVs of at least 3 experts, globally covering the fields of nature protection and biodiversity

### Criterion P7

#### Three Senior experts in Climate Action (profile B7)

<b>Minimum level of capacity</b>	<p>Experts in one of the following fields (at least 5 years' professional experience, out of which at least 3 in the EU): Climate Change Mitigation, Climate Change Adaptation, Climate Change Governance and Information.</p> <p>In addition, at least 6 years of professional experience (in total) with at least 1 year of experience in coordinating the work of team of at least 5 members.</p> <p>Higher education degree in the field of engineering, energy, transport, finance, agriculture, forestry, climate &amp; environmental sciences, economy, business management or equivalent professional experience of 4 years in the same fields (engineering, energy, transport, finance, agriculture, forestry, climate &amp; environmental sciences, economy, business management).</p>
<b>Basis for assessment</b>	This criterion applies to the tenderer as a whole, i.e. the combined capacities of all <i>involved entities</i> (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	Detailed CVs of at least 3 experts, globally covering two different fields.

#### Criterion P8

#### **Two Senior Experts for Data Management, including LPI and Land Purchase Databases (profile B8)**

<b>Minimum level of capacity</b>	<p>Experts with at least 5 years' professional experience in one of the following fields (within nature &amp; biodiversity, environment or climate action areas), out of which at least 3 in the EU: data management, indicators, databases.</p> <p>At least 6 years of professional experience (in total) with at least 1 year of experience in coordinating the work of a team of at least 5 members.</p> <p>Higher education degree in the field of engineering, computer science, programming, natural sciences, climate &amp; environmental sciences, economy, business management, business administration or equivalent professional experience of 4 years in the same fields (engineering, computer science, programming, natural sciences, climate &amp; environmental sciences, economy, business management, business administration).</p> <p>At least 5 years' professional experience in data management, including indicators.</p>
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	Detailed CVs of at least 2 experts, with a list of relevant activities implemented.

### Criterion P9

#### One Senior expert for NGO Operating Grants (profile B9)

<b>Minimum level of capacity</b>	<p>At least 5 years' professional experience, out of which at least 3 in the EU, in one of the following fields (within nature &amp; biodiversity, environment, climate action or energy transition areas): NGO management, NGO operating grants monitoring.</p> <p>At least 6 years of professional experience (in total) with at least 1 year of experience in coordinating the work of small team of 5 or more members.</p> <p>Higher education degree in the field of engineering, natural sciences, climate &amp; environmental sciences, economy, business management, business administration or equivalent professional experience of 4 years in the same fields (economy, business management, business administration).</p>
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	1 detailed CV with a list of relevant grants managed and activities implemented.

### Criterion P10

#### Two C2M Senior Experts (profile B10)

<b>Minimum level of capacity</b>	<p>Higher education degree.</p> <p>At least 6 years of professional experience in total.</p> <p>Such experience shall include at least:</p> <ul style="list-style-type: none"> <li>• 5 years' professional experience in one of the following fields (including at least 3 in the EU): business development, business coaching and mentoring, supporting companies to bring green products, technologies, services or processes into the market , in particular with focus on SMEs and start-ups.</li> <li>• 2 years of experience in coordinating the work of a team of at least 5 members.</li> </ul> <p>At least 5 years of experience in one of the following fields: business model/plan analysis, project financing, business modelling, or financial risk management.</p>
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).

<b>Evidence</b>	Detailed CVs of at least 2 experts.
<b>Criterion P11</b>	
<b>Two C2M senior coaches (profile B11)</b>	
<b>Minimum level of capacity</b>	<p>Higher education degree.</p> <p>At least 6 years of professional experience (including at least 5 in the EU) in one of the following fields: business coaching and mentoring, or connecting businesses and investors and facilitating investment deals.</p> <p>2 years of experience in coordinating the work of a team of at least 5 members.</p> <p>At least 5 years of professional experience in one of the following fields (including at least 3 in the EU): green business development, supporting companies to bring green products, technologies, services or processes into the market , in particular with focus on SMEs and start-ups.</p>
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	Detailed CVs of at least 2 experts.

<b>Criterion P12</b>	
<b>Nine Technical Monitoring Experts in Circular Economy and Environmental Health (profile B12)</b>	
<b>Minimum level of capacity</b>	<p>At least 3 years' professional experience in one of the following fields: Circular Economy, Environmental Health i.e. Water and seas, Air and Noise, Soil and Chemicals management, Environment Governance and Information.</p> <p>Higher education degree in the field of environmental engineering, industrial engineering, environmental management, business administration or equivalent professional experience of 4 years in the same fields (environmental engineering, industrial engineering, environmental management, business administration).</p> <p>At least 2 years' professional experience in project or programme management, including contractual and financial aspects.</p>
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).

<b>Evidence</b>	Detailed CVs of at least 9 experts, globally covering three different fields.
<b>Criterion P13</b>	
<b>Nine Technical Monitoring Experts in Nature and Biodiversity (profile B13)</b>	
<b>Minimum level of capacity</b>	<p>At least 3 years' professional experience in one of the following fields: nature protection, ecology or biodiversity.</p> <p>Higher education degree in the field of natural sciences, biology, ecology or equivalent professional experience of 4 years in the same fields (natural sciences, biology, ecology).</p> <p>At least 2 years' professional experience in project or programme management, including contractual and financial aspects.</p>
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	Detailed CVs of at least 9 experts, globally covering the fields Nature and Biodiversity.
<b>Criterion P14</b>	
<b>Nine Technical Monitoring Experts in Climate Action (profile B14)</b>	
<b>Minimum level of capacity</b>	<p>At least 3 years' professional experience in one of the following fields: Climate Change Mitigation, Climate Change Adaptation Climate Change Governance and Information</p> <p>Higher education degree in the field of engineering, energy, transport, finance, agriculture, forestry, climate &amp; environmental sciences, economy, business management or equivalent professional experience of 4 years in the same fields (engineering, energy, transport, finance, agriculture, forestry, climate &amp; environmental sciences, economy, business management).</p> <p>At least 2 years' professional experience in project or programme management, including contractual and financial aspects.</p>
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	Detailed CVs of at least 9 experts, globally covering the fields Climate Change Mitigation, Climate Change Adaptation, Climate Change Governance and Information
<b>Criterion P15</b>	

### Three Financial Monitoring Experts (profile B15)

<b>Minimum level of capacity</b>	<p>At least 3 years' professional experience in one of the following fields: accounting, auditing and financial management of projects.</p> <p>Higher education degree in the field of accounting, auditing or financial management of projects or equivalent professional experience of 5 years in the same fields (accounting, auditing or financial management of projects).</p>
<b>Basis for assessment</b>	<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 (sole tenderer or leader and members of the group, identified subcontractors).</p>
<b>Evidence</b>	<p>Detailed CVs of at least 3 experts, globally covering the field of accounting and financial management of projects of which at least 1 CV covering the auditing.</p>

### Criterion P16

#### Six Communication Experts (profile B16)

<b>Minimum level of capacity</b>	<p>Relevant higher education degree in communication or equivalent professional experience and at least 5 years of professional experience in the field of communication.</p> <p>In addition, the team of communication experts must include at least one member with proven experience in</p> <ul style="list-style-type: none"><li>• graphic design for web and printed products,</li><li>• journalism and editing,</li><li>• data management,</li><li>• web-publishing,</li><li>• management of physical, hybrid and virtual events,</li><li>• the most recent digital communication and social media tools,</li><li>• data collection techniques and production of audio-visual materials.</li></ul> <p>The team of Communication experts must demonstrate good understanding and knowledge of the thematic fields covered by the LIFE programme: nature &amp; biodiversity, circular economy and quality of life, climate mitigation and adaptation, and clean energy transition.</p> <p>Language requirements:</p> <ul style="list-style-type: none"><li>• At least 2 members of the team, in charge of drafting and editing, must have native-level or equivalent English knowledge (at least</li></ul>
----------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

	<p>C2 according to the European Framework of Reference for Languages<sup>[11]</sup>).</p> <ul style="list-style-type: none"> <li>At least 2 members of the team must have knowledge of 3 EU languages.</li> </ul> <p><sup>iii</sup> in the Common European Framework for Reference for Languages : <a href="http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp">http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp</a></p>
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	<p>Detailed CVs of at least 6 experts, listing relevant work experience and relevant higher education degrees.</p> <p>A language certificate or past relevant working experience in English (and other EU languages, where applicable) of 5 years.</p>
<b>Criterion P17</b>	
<b>One Intra-muros<sup>99</sup> expert working as Community Manager (profile B17)</b>	
<b>Minimum level of capacity</b>	<p>University degree in a relevant discipline such as Journalism, Communication, Graphic Design, Digital Marketing, Sustainability, Environment, Political Science, climate studies or similar.</p> <p>At least 5 years of experience in managing social media accounts related to at least one of the following: think-tanks, EU-funded projects, European associations, federations or public institutions and contributing to communication projects or projects with activities such as digital communication and social media tools. This experience must include management of LinkedIn and Instagram accounts of a least 6 months, and the production of visuals for social media engagement.</p> <p>Demonstrated experience or knowledge of EU Web guide, GDPR and IPR requirements is an asset.</p> <p>Experience of working independently with various stakeholders, notably donors, public authorities, NGOs in a multi-cultural context.</p> <p>Experience in advising clients for appropriate social media community management approach.</p> <p>Native-level or C2 English knowledge, knowledge of another EU language at C1 level according to the European Framework of Reference for Languages <a href="http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp">http://www.coe.int/t/dg4/linguistic/Cadre1_en.asp</a>.</p>

<sup>99</sup> See first page of Service 4 description, under section 1.4.2.2

	Ability to work independently and manage all aspects of online engagement, while also collaborating effectively with internal teams.
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	One CV, listing relevant work experience and relevant higher education degrees.  A language certificate or past relevant working experience in English (and other EU languages, where applicable) of 5 years.

### Criterion P18

#### **Two Junior Experts for Business Development/Access to Market Related Aspects (C2M junior expert) (profile B18)**

<b>Minimum level of capacity</b>	Experts with at least 2 years' professional experience in one of the following fields: business development, business coaching and mentoring, supporting companies to bring green products, technologies, services or processes into the market , in particular with focus on SMEs and start-ups.  At least 4 years of professional experience (in total).  Higher education degree in the field of economy, business management, business administration or equivalent professional experience of 4 years in the same fields (economy, business management, business administration).
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).
<b>Evidence</b>	Detailed CVs of at least 2 experts, with a list of relevant activities implemented.

### Criterion P19

#### **Language requirements for all profiles**

<b>Minimum level of capacity</b>	All members of the team must have at least C1 level in English in the Common European Framework of Reference for Languages <sup>100</sup> .
<b>Basis for assessment</b>	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 (sole tenderer or leader and members of the group, identified subcontractors).

<sup>100</sup> Common European Framework of Reference for Languages: Learning, teaching, assessment (CEFR); [www.coe.int/lang-CEFR](http://www.coe.int/lang-CEFR)

<b>Evidence</b>	A language certificate issued in the last 10 years or CV with past relevant working experience in English of 5 years. No need for evidence in the case of native English speakers.
-----------------	------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

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

☞ 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*).

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 "Table B - Volume hypothesis" (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)
<p>Criterion 1: Working method and organisation of the work and resources</p>	<p>This criterion will assess how the roles and responsibilities of the members composing the proposed team are organised and distributed (including between economic operators, in the case of joint tenders and/or subcontracting, if applicable) to carry out specific contracts in practice.</p> <p>In particular, it will assess the mechanisms proposed to ensure an efficient and effective coordination and performance of the services and tasks.</p> <p>It will assess the strategies for coordinating structures and tasks among the tenderer's various teams and the liaison with the Contracting Authority when relevant.</p> <p>The criterion will assess the allocation of time and resources to each service, task and deliverable, the rationale for that allocation and whether it is appropriate for the work to be performed. The relevant details should be provided in the technical offer.</p> <p>Costs or prices must be included in the financial offer only.</p>	<p>40 points</p>	<p>20 points</p>

	<p>Furthermore, this criterion will assess how the full team will be assembled in a timely manner and organised to ensure the availability of the required expertise throughout the assignment, and the method to replace staff and ensure business continuity.</p> <p>This criterion applies to the overall management of the framework contract and to the tasks listed under the four services in Section 1.4.2.2</p> <p>The points will be allocated as follows:</p>		
1.1	<i>Overall management of the framework contract and Service 1- Overall coordination and support</i>	14 points	7 points
1.2	<i>Service 2 - Technical and financial monitoring of grants</i>	13 points	6.5 points
1.3	<i>Service 3 - Thematic support to LPI, C2M projects and policy-related events, briefs and studies</i>	5 points	2.5 points
1.4	<i>Service 4 - Communication activities</i>	8 points	4 points
Criterion 2: Quality of the proposed methodologies	<p>This criterion will assess the suitability and completeness of the methodologies proposed in relation to the services and tasks described in section 1.4.2.2</p> <p>In particular, it will assess the extent to which the technical tender reflects a clear understanding of the requirements, proposes appropriate and well-structured methods for carrying out the tasks, and provides a realistic and adequate level of effort to meet the general and specific requirements.</p> <p>The criterion will also assess whether the methodologies are addressing the questions and challenges underlying the various tasks, in a realistic and well-structured way, and whether they are suited to the requirements defined by the Contracting Authority.</p> <p>The points will be allocated as follows:</p>	34 points	17 points
2.1	<i>Overall management of the framework contract and Service 1- Overall coordination and support</i>	10 points	5 points

2.2	<i>Service 2 - Technical and financial monitoring of grants</i>	<i>11 points</i>	<i>5.5 points</i>
2.3	<i>Service 3 - Thematic support to LPI, C2M projects and policy-related events, briefs and studies</i>	<i>6 points</i>	<i>3 points</i>
2.4	<i>Service 4 - Communication activities</i>	<i>7 points</i>	<i>3.5 points</i>
Criterion 3:  Quality assurance and quality control and mitigation measures	<p>This criterion will assess the quality control system proposed in the tender.</p> <p>In particular, it will assess the measures proposed to ensure the quality of the services and deliverables, the language quality check, compliance with deadlines and continuity of service in the event of the absence of a specific member of the team.</p> <p>The tender shall identify the critical steps in service delivery and the main risks that could limit the successful delivery of the requested services.</p> <p>This criterion will also assess whether the proposed quality arrangements are sufficiently detailed, operational and specifically adapted to the tasks that may be requested under the framework contract. A generic quality system not tailored to the specificities of the framework contract will result in a low score. This criterion applies to the overall management of the framework contract and to the tasks that are listed under the four services in Section 1.4.2.2</p> <p>The points will be allocated as follows:</p>	26 points	13 points
3.1	<i>Overall management of the framework contract and Service 1- Overall coordination and support</i>	<i>7 points</i>	<i>3.5 points</i>
3.2	<i>Service 2 - Technical and financial monitoring of grants</i>	<i>9 points</i>	<i>4.5 points</i>
3.3	<i>Service 3 - Thematic support to LPI, C2M projects and policy-related events, briefs and studies</i>	<i>4 points</i>	<i>2 points</i>
3.4	<i>Service 4 - Communication activities</i>	<i>6 points</i>	<i>3 points</i>

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 following order listed in below until a most economically advantageous tender can be determined: Criteria 2, Criteria 1 and Criteria 3.

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://webgate.ec.europa.eu/fpfis/wikis/x/5QEkh>

Make sure you prepare and submit your tender in eSubmission early enough to ensure it is received within the deadline indicated under Section 5.1.12 of the contract notice and/or on Funding & Tenders Portal (F&T Portal) <sup>101</sup>.

### 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.

- *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.

It is the responsibility of each tenderer to ensure that the total amount of the tender inserted in the eSubmission field “Total amount” corresponds to the amount indicated in the uploaded financial tender. In case of discrepancies, only the amount indicated in the financial tender will be taken into account.

*Annex 6 “Price and breakdown of costs”* consists of 2 tables:

- Table A for the unit prices (“A - Cost categories”). The unit prices quoted by the tenderer in Table A will be the binding applicable rates under the framework contract, if awarded.
- Table B with a hypothesis of volume (“B - Volume hypothesis”) will be used for the financial evaluation of the tenders. Tenderers must apply the unit prices as quoted in Table A, without modification, to the volumes indicated in Table B, so as to get to the “Total price used for the assessment of the financial offer”.

The volumes specified in Table B are for evaluation purposes only, and do not represent any indication or commitment from the Contracting Authority, as to the actual volume of services which could be ordered under specific contracts. Any modification of the template of the financial tender may lead to rejection of the tender. The tenderer must not change,

---

<sup>101</sup> <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>

add, hide or eliminate any part of the template such as row, column or cell, or change the texts already prefilled in the template.

The financial tender shall fulfil the following requirements:

- prices 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.
- prices should be expressed to a maximum of 2 decimal places
- prices shall be 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, subsistence and any other expenses. **Travel, subsistence and any other expenses shall not be reimbursed separately.**

The unit prices quoted in Table A shall apply throughout the duration of the framework contract, including in the event of renewal, subject to the price revision provisions of the draft framework contract.

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 <sup>(102)</sup> 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.

---

<sup>(102)</sup> See [here](#) how to apply a QES on a document exchanged with a European institution, body or agency.

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 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 <sup>(103)</sup>.

---

<sup>(103)</sup> 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](#).

- 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 <sup>(104)</sup>, 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.

---

<sup>(104)</sup> See Article 4 (2) of the [Regulation \(EC\) No 1049/2001 regarding public access to European Parliament, Council and Commission documents](#).

## **5. FUNCTIONING OF THE FRAMEWORK CONTRACT**

### **Stability of the service**

For the duration of the framework contract, the contractor will ensure the continuity and stability of the services required for the proper performance of the specific contracts.

For tasks that require continuity, such as general coordination, the contractor shall ensure that the staff concerned remain unchanged, as far as possible, throughout the duration of the framework contract.

Any change to a Coordinator, Expert or other staff member involved in the framework contract or a specific contract must be notified in advance to the Contracting Authority by the contractor. Before their appointment, the CV of the proposed expert must be submitted to the Contracting Authority for approval. The Contracting Authority reserves the right to request the replacement of any staff member who does not have the expertise required to provide the services in accordance with Article II.4. of the General Conditions of the draft framework contract.

Under no circumstances may the contractor invoke a change of staff as a reason for failing to meet an obligation, in particular as regards deadlines and quality.

### **Request for services**

The framework contract will be implemented through the signature of individual specific contracts.

After signature of the framework contract, the relevant Contracting Authority will request services by sending the contractor a request for services by email.

The request for services will set out the specific terms of reference for the assignment, including the estimated value, in terms of maximum amount, the starting date and the duration of the assignment, taking into account the deadline for submission of the offer and the time required by the contractor to set up a team to perform the requested services.

The contractor must submit a detailed specific offer explaining how the requested tasks or services will be performed. The specific offer shall be drawn up according to the requirements of these tender specifications, on the basis of the framework contract price list, Table A – ‘Cost categories’ included as Annex II to the signed framework contract, see Section 4.2.

The contractor must confirm by email its intention to accept the service request within a maximum of five calendar days from the date when the e-mail with the request for services was sent, unless the Contracting Authority has established a different deadline in the request for services.

If the contractor accepts the service request, it must submit its detailed specific offer within a maximum of 20 calendar days from the date when the email with the request for services was sent, unless the Contracting Authority has established a different deadline in the specific request for services.

If the contractor does not accept the service request, it must state the reasons for why it cannot accept it.

If the contractor repeatedly refuses to sign the specific contracts or repeatedly fails to send them back on time, it may be considered in breach of its obligations under this framework contract as set out in Article II.18.1 (c).

### **Submission of a specific offer**

The contractor must provide its offer for the tasks or services requested, including:

- (a) an outline of the method proposed;
- (b) a work plan;
- (c) the CVs of the team of experts proposed when relevant.
- (d) a budget breakdown, including the total price for rendering the services requested on the basis of the framework contract price list, Table A – ‘Cost categories’, included as Annex II to the signed framework contract.

In each specific offer sent in reply to a request for services, the contractor will indicate the single point of contact for the future specific contract. The Contracting Authority will be the contractor's single point of contact for specific contract conclusion and implementation, including payment(s).

After the entry into force of this framework contract, at any time during its course the Contracting Authority may formally notify in writing the contractor that certain communications will be made by electronic means through the EU Funding & Tenders Portal (the Portal), in accordance with the Portal Terms and Conditions and using the forms and templates provided there. More details can be found under Article I.7.1. Communication via electronic exchange system of the framework contract.

### **Acceptance of the specific offer**

The Contracting Authority will have up to 15 calendar days to evaluate and accept or reject the offer. If the offer does not fulfil entirely the requirements of the request for services, the Contracting Authority will inform the contractor and may allow an additional period for the submission of a revised offer. If the revised offer still does not correspond to the request for service, the Contracting Authority may reject the offer.

### **Specific contract**

Acceptance of the offer will lead to signature of the specific contract in line with the procedure described in Article I.4.3 of the draft framework contract.

No standstill period is applicable for specific contracts based on a framework contract.

**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 <a href="#">EU Grants and Tenders Rules on Legal Entity Validation, LEAR appointment and Financial Capacity assessment</a>
<i>Exclusion criteria</i>	See Section 3.1
<i>Financial Regulation</i>	<a href="#">Regulation (EU, Euratom) 2024/2509 of the European Parliament and of the Council of 23 September 2024 on the financial rules applicable to the general budget of the Union (recast)</a>
<i>Framework contract</i>	See Section 1.6
<i>Framework contract ceiling</i>	See Section 1.7
<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 <a href="https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register">https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/participant-register</a>
<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: <a href="https://europa.eu/european-union/law/treaties_en">https://europa.eu/european-union/law/treaties_en</a>

# 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 tender form

Annex 7- Relevant information for tenderers

Annex 8 - Draft framework contract and annexes

