

Directorate-General for Internal Policies of the Union

Directorate for Structural and Cohesion Policies

ANNEX II

TERMS OF REFERENCE
FOR A RESEARCH PROJECT ON
CREATIVE EUROPE: TOWARDS THE NEXT PROGRAMME GENERATION
IP/B/CULT/IC/2017-084

1. BACKGROUND AND INTRODUCTION

The European Parliament's Committee on Culture and Education (CULT) wishes to commission a research project on "Creative Europe: Towards the Next Programme Generation".

The research project will be managed by the Policy Department, a unit dedicated to providing the Committee with expert input.

The Committee's Coordinators requested this study in their meeting of 27 February 2017.

This topic is of central interest to the Committee: the Creative Europe programme, the only EU multiannual programme directly targeting the cultural and creative sectors (CCS), is part of its core competence and one of the most important legislative dossiers the Committee deals with.

Furthermore, the European Commission's mid-term evaluation report of the programme is expected for the end of 2017, and the Committee may decide to draw up a (non-legislative) report in response to the Commission's report, with a view to making its views known before the Commission drafts its proposal for the 2021-2026 programming period.

The Policy Department research is therefore necessary to provide research input and recommendations to the Committee for its deliberations on the next multiannual programme. An initial literature search shows that there is a wide range of materials and research available as a basis for the required analysis, but no ready-made solution for the Committee's needs.

The project will deliver: a written study regarding Creative Europe programme and its predecessors for Members, a slide-based presentation and a summary text that may be edited and used by the Policy Department in a customised publication. A presentation in person to the Committee by the research Contractor is normally required. All of the products will be copyright of the European Parliament and may be published by the European Parliament in paper, digital and/or video form.

The Contractor must meet the goal defined at 2.1, achieve the objectives defined below at 2.2 and deliver to the standards defined in Sections 3 to 6 following. Payment is based on fulfilment of these requirements. Failure to meet the requirements in full may result in part-payment or, in case of serious default, the cancellation of the contract by the European Parliament and non-payment.

2. AIM AND OBJECTIVES

2.1. Aim of the project

The primary aim of the project is to provide useful, authoritative and timely information to Members of the CULT Committee on the subject of "Creative Europe: Towards the Next Programme Generation". The overall goal of the research is to provide expert input and recommendations to the Committee for its deliberations on the next multiannual programme in support of cultural and creative industries.

2.2. Project objectives

The project will meet the following objectives:

- i. Deliver and present a study for Members of the CULT Committee of around 60-80 pages (maximum) providing a comprehensive analysis of existing studies, (position) papers and other publicly-available evidence on Creative Europe and, where relevant, its predecessors from various sources and in various languages; this includes an analysis of the Commission's mid-term report, expected for the end of 2017.
- ii. Deliver the study in time for the first exchange of views on an own-initiative report in response to the mid-term evaluation report on Creative Europe by the Commission, if such a report is launched.
- iii. All the strands of the Creative Europe programme must be covered: the MEDIA sub-programme, the Culture sub-programme, the cross-sectoral strand, which includes a stand-alone financial instrument, the Guarantee Facility, and also the international dimension of the programme;
- iv. The aspects of the current programme related to decision making via delegated and implementing acts should be analysed:
 - This entails a brief summary of what delegated and implementing acts are and why they are used in EU legislation, followed by an analysis of the architecture of the programme, clarifying what is decided under delegated and implementing acts including the roles of the Parliament, Council and Commission in drafting and scrutinising them.

- On that basis, the implementing acts, in particular the annual work programmes, should be analysed further to see whether important decisions on the (annual) orientation of the programme are taken through implementing acts, and to what degree; and whether delegated acts or some other mechanism would be more suitable for taking such decisions.
 - This analysis and any lessons learned and conclusions drawn should feed into recommendations on the design of the future programme as regards the appropriate choice between delegated and implementing acts, striking a balance between the necessary flexibility to implement the programme while allowing the European Parliament to have a say in important decisions on the (annual) orientation of the programme.
- v. Evidence-based and feasible overall recommendations on the orientation of the future programme generation shall be provided in order to feed into the Committee's deliberations of the actual Commission mid-term report conclusions. These recommendations should be based on an analysis of the evidence drawing on a solid knowledge of the architecture of Creative Europe and its predecessors (MEDIA and Culture Programmes 2007-2013).

The Contractor may propose minor clarifications/revisions/complements to the scope of the research and to the specific issues mentioned, to be agreed with the European Parliament in all cases. The project objectives are not open to revision.

3. APPROACH AND METHODOLOGY

The Contractor is free to propose the approach and methodology considered most appropriate to achieve the best possible research results and accomplish the objectives set out. The approach and methodology chosen must be clearly presented along with the reasoning for the choice of methodology in an annex to the study, with a brief summary in the main body of the text. The study must:

- reflect on, and use, the relevant international research literature in the field;
- consider relevant studies and other content made available by national governments (e.g. the National Authorities, relevant Ministries, etc.), National Creative Europe Desks, the Commission, the Executive Agency, the European Parliament, other European institutions, NGOs and stakeholders, both at national and European level. It must also include academic research published in relevant academic journals/conference proceedings;
- apply a systematic referencing system for all material that is used, accompanied by a complete and consistent bibliography (where available, permanent hyperlinks for electronic documents are to be indicated);
- provide insights into the topic going beyond the current state of scholarship, based on the Contractor's expertise, and deliver original content in the form of analysis, synthesis and/or research, according to the particular needs of the Committee.

A clear outline of the approach and methodology suggested by the Contractor shall form part of the comprehensive **research design/programme**, which will be commented upon by the European Parliament and which must be agreed during the inception process (see Section 6 below).

4. GEOGRAPHICAL AREA TO BE COVERED

The project should draw on evidence and cases from a good cross-section of at least 10 EU Member States/regions (large and small states; north-south, east-west):

- i. among them there should be a selection of largest beneficiaries as well as Member States that are less successful in making use of funding from Creative Europe;
- ii. evidence from the UK (as a major recipient country) in as far as such evidence would have value for actual Member States in 2021;
- iii. evidence and analysis at 'EU' (rather than Member State) level should also be taken into account (e.g. analyses and studies commissioned by the European Commission, the European Parliament and other EU institutions; but also materials drafted by umbrella organisations at EU level).

The submitted offer is expected to include a proposal for a list of countries from which evidence is to be drawn and/or from which cases are to be analysed. There should be a clear description of the criteria based on which the list of countries has been established. The precise geographical scope may be refined during the inception process. Both the Contractor and the EP may propose refinements during inception; the proposals must be mutually agreed to stand.

The final study shall deliver conclusions relevant at the EU level, in particular to EU policy makers.

5. STANDARDS

5.1. Academic, management and commercial standards

The Contractor is required to conduct the project according to ethical principles including the highest standards of research integrity, notably as set out in the [European Code of Conduct for Research Integrity](http://www.allea.org/wp-content/uploads/2017/03/ALLEA-European-Code-of-Conduct-for-Research-Integrity-2017-1.pdf)¹, and, in particular, avoiding fabrication, falsification, plagiarism and other research misconduct. The project must be addressed in accordance with the **highest professional, management and commercial standards**.

The standards to be respected include the following:

¹ <http://www.allea.org/wp-content/uploads/2017/03/ALLEA-European-Code-of-Conduct-for-Research-Integrity-2017-1.pdf>- The European Code of Conduct for Research Integrity of ALLEA (All European Academies) and ESF (European Science Foundation) (revised March 2017).

- **Existing work** within the relevant scientific community **shall be taken into account as broadly as possible**, including research that challenges the Contractors' own results. Contradictory findings shall not be excluded at the outset.
- **All material from the work of others** which is used for the assignment, such as, data, information, ideas, concepts, methodologies, quotes and literature **must be clearly identified** and stated at the appropriate place in the text by way of a systematic referencing system. These works must be attributable to their original authors. Any passages which have been copied, totally or in part, whatever their origin, and be it titles, quotations or abbreviations, must be identified as such and accompanied by the relevant references. A complete bibliography, and where applicable, a list of persons/organisations interviewed, is essential.
- The above mentioned referencing system shall be the **Harvard system**.²
- The Contractor is wholly responsible for ensuring that any content used in the study or other supplied products has the **necessary copyright permissions** for publication and, where relevant, payments to the owner have been made by the Contractor (see also section 7).
- The Contractor is required to **manage all members of the team** delivering this contract **in an ethical manner, respecting basic social rights and working conditions** based on international labour standards and applicable legislation (see also Article 12 of the Specific terms and conditions applicable to the contract in this respect). The Contractor and members of the team should respect the provisions of the European Charter for Researchers.³
- The Contractor shall put in place **effective internal quality control** mechanisms, including editorial review and peer review (internal or external, by a person with appropriate expertise). The operation of the quality control mechanisms described in the bid for the contract may be verified during the contract by the European Parliament.
- **Factual accuracy shall be ensured.** Contractors must deliver products which fully take into account the evidence available to them, without omission, misrepresentation or deception. The most recently available relevant and authoritative information and data shall always be included.
- **The research must be objective, independent and balanced.** The study must stand up to scrutiny in a political context. Even small factual errors, imprecise or ambiguous wordings or an unclear, inaccurate or incomplete stating of sources and references might jeopardise the credibility of the work as a whole.
- Contractors should **remain aware of the limitations of the research method**, including a consciousness of the impact of their own views and

² In the Harvard system, references are cited in the text using the author's surname and year of publication, (Barrett, 1991), and the bibliography is printed in alphabetical order. Where an author has two or more publications cited from the same year, they should be listed as a, b, and so on, for example (Barrett, 1991a).

³ <https://euraxess.ec.europa.eu/jobs/charter/european-charter>

opinions which may predetermine an outcome. The uncertainty inherent in any scientific result should be reflected in the findings and conclusions.

The European Parliament respects the integrity of the research process and the evidence-based conclusions and recommendations of the contractor, assuming that the above standards have been met. The opinions expressed in the final study will be considered the sole responsibility of the contractor - the contractor is not expected to reflect the position of the European Parliament. A disclaimer in the published study will reflect this.

5.2. Conflicts of interest and professional conflicting interest

The Contractor shall take all the requisite measures to prevent any situation arising which could compromise the impartial and objective performance of the contract. A conflict of interest may arise in particular as a result of economic interests, political or national affinities, family or emotional ties, or any other relevant connection or shared interest.

Any suspicion of conflict of interest or professional conflicting interest arising during performance of the contract must be reported immediately to the European Parliament in writing. In the event of such a conflict, the Contractor shall immediately take all the requisite measures to resolve it. The European Parliament reserves the right to verify that such measures are appropriate and to require additional measures to be taken, if necessary, within a time limit that it shall stipulate.

The Contractor shall ensure that any member of the research team is not placed in a situation which could give rise to a conflict of interest. The Contractor shall replace, immediately and without requiring any compensation from the European Parliament, any member of the research team exposed to such a situation.

5.3. Linguistic and typographical quality standards; proofreading

- For all products delivered under this contract, the language - style, grammar and spelling - should be current UK English, verified by a competent/qualified speaker.
- Plain language, understandable to a layperson and to someone using a second or third language, shall be used to the maximum extent possible, taking into account the topic. The study is not aimed at a primarily academic audience, it is for Members of the European Parliament, and should be written accordingly.
- In case products are created in another language and translated to English, all costs of translation, and verification of its quality, are the responsibility of the Contractor.
- Products should be delivered ready for publication, already proof-read and without typographical errors.
- The European Parliament may require evidence of linguistic verification and proofreading. It will return products for re-work, at no additional cost to the European Parliament, in case the products delivered do not meet these standards.

5.4. Format, Style and Layout Rules

The study should comprise a maximum of **60-80 pages** (excluding bibliography and annexes), accompanied by an **executive summary** of **maximum 7.500 characters (without spaces)**, and is to be delivered in **English**. In addition, the conclusions of each chapter should be briefly summarised in a **text box entitled "Key Findings"**.

The executive summary should focus on key findings and recommendations for action. Discussion and description of methodology should be minimal and in the latter part of the summary.

Methodology and approach should be described in an annex to the study. They may be *briefly* summarised in the introduction.

A **bibliography** including references to websites must be included in the study together with any necessary detailed annexes. A list of abbreviations and acronyms, a list of tables and a list of figures should be provided, if applicable.

The Contractor shall follow the drafting and layout rules as defined in the **MS Word Model** provided in electronic form by the EP (see Annex VI of the invitation to tender on "Layout Model for Research Papers Conducted for DGs Internal Policies and External Policies of the European Parliament"). **The use of this template which defines all formats used for the study is mandatory.**

For the preparation of bibliographies as well as for acronyms, abbreviations, statistical symbols, units of measurement, countries, territories and currencies, punctuation in figures and all other issues which are not dealt within the above mentioned template, the application of the **Interinstitutional style guide**⁴ shall be mandatory.

All data used for the production of tables/charts/schemes etc. should be provided in **MS-Excel sheets** for editing purpose. No scanned or low definition images and charts should be used. With a view to translation **all tables/charts/schemes etc. must be editable.**

5.5. Quality control

The contractor is encouraged to have the study reviewed before delivery. After delivery, the draft and the final study will undergo **internal evaluation** by the European Parliament's research services, including computer-assisted plagiarism detection, and may also undergo **external (peer) review**. Changes in the study may be required based on the evidence of these reviews.

The final acceptance of the products submitted is subject to the full and faithful compliance with all requirements of quality and form. Their neglect may result in the cancellation of the contract by the European Parliament and non-payment.

⁴ <http://publications.europa.eu/code/en/en-000100.htm>

6. DELIVERY PROCESS AND PRODUCTS

The delivery of the project will follow the procedure outlined below, unless varied through mutual agreement. The procedure and the deadlines within it are mandatory requirements.

6.1. Inception process

After the contract coming into force, the Contractor – represented by the project manager/lead researcher(s) responsible for the study– is required to participate in an **inception process**. During the inception process the **research design/programme** provided by the Contractor will be discussed. The process may include a meeting, the date of which is to be fixed between the Contractor and the European Parliament. The meeting may be via video or other remote link and shall take place **15 days** after the contract coming into force. The process may, however, be conducted simply by email/telephone, at the discretion of the European Parliament). The process is completed by a concise written report to be drawn up by the Contractor and to be agreed by the European Parliament. During the inception process, both the Contractor and the European Parliament may propose minor clarifications/revisions/complements to the scope of the research and to the specific issues mentioned. These proposed minor changes must be mutually agreed to stand. The project objectives are not open to revision.

6.2. Progress report

A progress report must be submitted to the European Parliament no later than **45** calendar days after the contract coming into force. The report of maximum 2 pages should summarise the achievements and the problems encountered.

6.3. Draft study

A draft study, meeting the requirements set out at Sections 2 - 5 above, and including an executive summary, must be submitted by electronic mail to: poldep-cohesion@ep.europa.eu no later than **90** calendar days after the date of the contract coming into force.

An analysis of the Commission's mid-term report is a crucial part of the research requirement. In case the Commission does not publish the report by the end of 2017, but with a delay, the Contractor shall be granted **an additional 20 calendar days** from the date of publication of the Commission's mid-term report to supplement the analysis already provided in the draft study (which needs to be submitted by the due date to the EP services as set out in the first paragraph of section 6.3., independent of the publication of the mid-term report).

6.4. Final study

Within **20** calendar days from the date of receipt of the draft study, the European Parliament shall transmit its **observations** and those of external (peer) reviewers (general feedback; requests for revision and/or supplementation, etc.) to the Contractor, and shall request delivery of the **final study** within a further **15** calendar days. The approval of the final study requires that all observations have been taken into full account.

In case the Commission has published the mid-term report with a delay and the Contractor has been granted an additional 20 calendar days from the date of publication of the Commission's mid-term report to supplement the analysis already provided in the draft study, the European Parliament shall transmit its additional observations on the new parts of the text **within 10 calendar days** to

the Contractor, and shall request delivery of the final study **within a further 10 calendar days**.

The final version of the study shall be accompanied by:

- an **annex** of 1-4 pages (maximum) that summarises the key evidence, analysis and implications for the Committee's work. This annex may be based on the Executive Summary. The Policy Department shall have the right to edit, add to and redesign this annex at will, in order to publish it as a separate stand-alone product under its responsibility. The annex will not be published with the main product but will refer to the main product and its author(s) as the primary source for its content. The Contractor shall have no responsibility for the final version of this supplementary product, other than for the accuracy of facts or data directly reused from the study.
- a **set of slides** suitable to support an in-person ten-minute presentation of the study to Members. Guidance on a suitable length and format for the slides (and for the potential presentation in person) will be given and must be followed (See also Annex VII. Powerpoint template for the presentation).

6.5. In-person presentation

The Committee normally requires an in-person summary presentation of the study, and this is an integral part of the contract and will be charged in accordance with the financial offer of the Contractor. The presentation may be in Brussels or in Strasbourg. The choice to have a presentation or not, the location (Brussels or Strasbourg) and the scheduling of the presentation are all at the discretion of the European Parliament. The content of the presentation must be ready on delivery of the final version of the study and the oral presentation may be required at any date in the period following delivery. The Policy Department will seek to agree a date with the Contractor, allowing reasonable notice and making reasonable allowance for the Contractor's circumstances. A presentation may not be required due to volume of other Committee business or for other reasons. If the Committee postpones presentation beyond 30 November of the calendar year following the entry in force of the contract then the requirement on the Contractor will be deemed to have been met.

A presentation will normally be followed by a discussion with the Members of the CULT Committee in the format of a "question and answer session".

The presentation shall be carried out by the most adequate person, who can guarantee a lively, high quality oral presentation, using the most appropriate technical support and communication tools. If this person is different from the author, then the latter should also be present in order to reply to questions from Members.

The presentation may be recorded and/or broadcast by the European Parliament which will hold the copyright on the content.

6.6. Reporting progress

The Contractor must keep the European Parliament informed of progress during the project, with a reporting schedule to be agreed in the inception process. In any event, the Contractor must promptly notify the European Parliament of any situation that could lead to a significant delay or shortfall in quality in any of the deliverables mentioned above. The definition of 'significant delay' will be agreed

for each deliverable in the inception process but for the delivery of the final study it will be a maximum of one-week, and may be zero. The notification shall include a description of the problem, an indication of the date on which it arose and details of the steps taken by the Contractor to comply with all his contractual obligations. In such an event the Contractor shall give priority to solving the problem rather than to determining who is responsible.

6.7. Continuity

For the duration of this service contract, the Contractor must guarantee the same level of quality as previously defined in the selection criteria. This guarantee of continuity shall also apply in drop-outs of experts, e.g.

- on account of sickness or accident, a team member is unable to continue providing services,
- any person specified in the contract does not perform his duties under this contract,
- for any other reason beyond control of the contractor, it becomes necessary to replace any member of the research team or other personnel involved in delivering the project.

In such cases, the contractor shall provide a replacement with at least equivalent qualifications and experience and acceptable to the European Parliament.

7. COPYRIGHT AND PUBLICATION

7.1. Publication by the European Parliament

The final version of the study and other products noted at Section 6 above (other than the Draft Study and Progress Report) may be published by the European Parliament and the Office of Publications of the EU. Publication may be in hard-copy or digital form (including sound and video recordings) and may be internal to the European Parliament or may be worldwide. The European Parliament retains the copyright on all such products and to their contents, which may be adapted and/or re-used as the European Parliament sees fit.

For the final study, reproduction and translation for non-commercial purposes are authorised, provided that the source is acknowledged and the European Parliament is given prior notice and sent a copy. If the contractor wishes to publish the study under their own name then permission should first be sought from the European Parliament.

7.2. Moral rights of creators

By delivering the required products, the Contractor warrants that none of the creators of any of the included content will object to the following on the basis of their moral rights under copyright:

- that their names be mentioned or not mentioned when the products are presented to the public;
- that the products be divulged or not after they have been delivered in their final version to the contracting authority;

- that the products be adapted, provided that this is done in a manner which is not prejudicial to the creator's honour or reputation.

If moral rights on parts of the products protected by copyright may exist, the Contractor must obtain the consent of creators regarding the granting or waiver of the relevant moral rights in accordance with the applicable legal provisions and be ready to provide documentary evidence upon request.

8. AVAILABLE BUDGET

The maximum budget available for this project is **40,000 EUR (forty thousand Euros)**.

This includes any travel costs for experts coming to Brussels or Strasbourg in order to present the study.

9. INVOICING AND PAYMENT SCHEDULE

The Contractor may issue its first invoice after acceptance by the Policy Department of the completed study and PowerPoint presentation file. This invoice should cover all products that have been delivered up to the date of the acceptance of the final study.

A second invoice is to be submitted once all other remaining products have been delivered and accepted. In the unlikely event that the Committee cancels the planned presentation, or does not follow-through on the plan with a definite date for a presentation to take place before 30 November of the year following contract signature, the price of the presentation may also be invoiced.

10. DELAY, MANIFEST NEGLIGENCE, NON-PERFORMANCE, NON-CONFORMITY AND INCORRECT PERFORMANCE

In the event of delay, negligent performance, complete or partial non-performance, non-conformity with the contractual requirements or incorrect performance of this contract or the order forms or specific contracts, which must be duly motivated by the European Parliament's services, the European Parliament may, by way of sufficient reparation for the loss sustained, deduct damages in the relevant amount from the remaining amount payable to the Contractor supplemented, if applicable, by late-performance interest and the costs that it has borne in connection with that loss.

In case of complete non-performance, the amount deducted may reach the total outstanding amount; among others, such a case shall be deemed to happen if the European Parliament rejects the service provided because the service did not conform to the quality standards as contained in the Terms of Reference.

In case of partial non-performance, the amount deducted shall be equivalent to the importance of the part not supplied as compared to the entirety of the services to be provided. In case of negligent or incorrect performance or non-conformity with the contractual requirements, a lump-sum of the outstanding amount shall be deducted. Such a case of negligent or incorrect performance or non-conformity with the contractual requirements shall, among others, arise if:

- the study is not structured coherently or not drafted in a concise, non-technical language and thus not easily readable; in such a case, at least 20% of the outstanding amount shall be deducted;
- cases of plagiarism may be penalised by a deduction corresponding to the scale and severity of the misdemeanour - up to and including contract termination without compensating the Contractor. In case of minor and unintended plagiarism, if all instances are not promptly identified and removed when an issue is reported to the Contractor by the European Parliament, then a penalty of at least 25% will be levied without prejudice to the European Parliament's rights to terminate the contract;
- the linguistic verification and typographical proof-reading has not been properly conducted; in such a case, a lump-sum of up to 20% of the outstanding amount shall be deducted;
- the Contractor ignores or does not respond to reasoned requests of the European Parliament to implement changes meant to improve the draft version of the study and thus more than one formal letter from the European Parliament's contracting authority is necessary to achieve a sufficient quality of the study; in such a case, a lump-sum of up to 25% of the outstanding amount shall be deducted.
- If several of these cases apply, the different deductions will apply cumulatively.

Without prejudice to the paragraphs above, the European Parliament may apply a penalty per calendar days of delay, from the date on which the Contractor is notified of the delay by email from the functional mailbox: poldep-cohesion@ep.europa.eu with delivery/read receipt.

The penalty will be calculated according to the following formula:

$50\% \times (\text{calendar days' delay} / \text{number of calendar days initially foreseen}) \times \text{total value of the contract.}$

The number of calendar days initially foreseen for the final version of the product is to be calculated from the signature of the order form by the European Parliament until the respective deadlines as set out in the terms of reference.

In the circumstances referred to in paragraphs above and without prejudice to any administrative and financial penalties imposed by the European Parliament may, if notice has been served on the Contractor by registered letter with acknowledgement of receipt and no action, or inadequate action, has been taken in response within 15 calendar days of its dispatch, terminate the contract with immediate effect by notification by registered letter with acknowledgement of receipt, without compensating the Contractor.

11. SUBCONTRACTING

Subcontracting is permitted under these conditions:

The tenderer must give details of the part of the contract that he or she proposes to subcontract and of the identity of the subcontractor(s). The following documents must be provided for each subcontractor:

- Documentation of their willingness to accept the tasks and their acceptance of the terms and conditions set out in the invitation to tender and in the annexes thereto.
- Documentation on the subcontractor's technical capacity: curricula vitae of subcontractor's experts; detailed references for services of a similar nature; description of network of contacts, membership in research networks or think-tanks, etc.

During the contract award procedure, the European Parliament reserves the right to require tenderers to supply further information about the financial, economic, technical and professional capacity of the proposed subcontractor(s). Likewise, the European Parliament may demand the requisite proof to establish whether the subcontractors comply with the exclusion criteria.

12. SELECTION AND AWARD CRITERIA

12.1. Selection criteria

(A) Technical capacity:

Candidates must:

- propose a team of experts with sound educational/professional qualifications and experience that are clearly relevant to delivery of the research requirement. At least one team member must have a proven publishing record on issues relevant to the topic of the study, in the specialised press and/or in the academic journals of reference within the past 5 years. (A current CV should be provided for each expert highlighting the relevant elements);
- propose a project leader with at least 7 years of relevant experience. His/her expertise should be clearly related to the topic of the study. (A current CV should be provided);
- demonstrate they have access to relevant and sufficient information and data sources as well as a sufficient network of contacts with the scale, scientific capacity, geographical coverage and quality of specialists necessary to meet the research requirement. (*For example*, candidates could indicate the nature of the research library available to the team in terms of online and hard-copy resources (collection level, not item level) whether in-house or accessible externally; the availability of particular statistical datasets or text-based databases; the competence of the network of established contacts beyond the team that might be called on for the research, in terms of scientific and geographic scope, scientific knowledge etc).

The European Parliament may request evidence of performance of the services of a similar nature listed in a tender in the course of the evaluation procedure.

Candidates must submit:

- An **overview of the research team** in form of a **table** comprising for each expert
 - name
 - nationality
 - language skills
 - academic qualifications
 - scientific specialisation relevant for this study
 - short description of his/her position, his/her role in the project as well as subtopics of the study to be covered by the expert
 - his/her involvement in other projects relevant to this study.
- The **curricula vitae** of the project leader and the other members of the team assigned to the expertise, specifying knowledge of languages, academic qualifications and primary background, expertise and experience relevant to the subject, indicating dates, place of work and recipients of the work, including a list of publications in the specialised press and/or in the academic journals of reference in the relevant area.
- An **overview of available data sources and network of contacts**

(B) The economic and financial capacity to provide the services:

Candidates must submit:

- a signed declaration of financial capacity, professional independence and absence of conflicts of interest. (See Point 3 of Annex V - Information Form)

The EP reserves the right to seek evidence at any time relating to the tenderer's economic and financial capacity

10.2 Award criteria

The total amount of points will be calculated as follows: Quality points x 70% + Price points x 30%.

(A) Quality sub-criteria

Under Quality, the following sub-criteria exist:

i) Demonstrated understanding of the project requirements (35 points)

The assessment in this section will consider: demonstrated understanding and command of the research requirement; demonstrated understanding of the requirements for drafting, accessibility, formatting and presentation.

Candidates must submit:

- A **statement of their understanding of the specified research requirement**. This should, in a single document, present: the background to the topic; main aspects of the topic; particular issues to be examined; availability of data; the main scientific and stakeholder points of view; and any other matter the tenderer considers important to the research topic. The statement should be a **maximum 10 pages**. Exceeding the maximum will be penalised. Anti-plagiarism software may be used in the assessment of this statement and evidence of plagiarism will lead to exclusion.
- A **PowerPoint-type presentation** summarising the above statement, suitable for supporting an oral presentation to a non-specialist audience in +/- 5 minutes.

ii) Proposed methodology (30 points)

General approach, research methodology, geographical coverage of the analysis and work to be performed: tenderers must explain how they propose to perform their tasks in order to achieve the objectives set out in Section 2, in terms of academic methods and in terms of the main elements to be covered. The assessment in this section will consider the scope of coverage and sources proposed; the relevance and quality of the approach; and the robustness of the methodology.

Candidates must submit:

- A clear and comprehensive presentation of the proposed methodology. The length should be a **maximum 10 pages**. Exceeding the maximum will be penalised.
- A **list of specific sources** (item level listing) selected for use in the future research project should be appended to the statement. This appendix will not count towards the 10 page limit.

(iii) Organisation and means employed for the project (30 points)

- Proposal for organisation, management and coordination of the work. Clear, comprehensive and credible project plan including (a) an assessment of significant risks and potential mitigating/contingency actions (b) a defined approach to quality.
- Clear distribution of tasks in the team, optimising the use of the expertise put forward for the project. Evidence of significant and credible engagement of the most senior experts and the project team leader.
- Cooperation with EP services: tenderers must provide a detailed description of their proposed approach;
- Method of ensuring linguistic quality (including proofreading) of the research.

Candidates must submit:

- A clear and comprehensive presentation of the proposed organisation, management and coordination. The length should be a **maximum 10 pages**. Exceeding the maximum will be penalised.

(iv) As an indicator of quality, overall presentation of the offer in terms of clarity, coherence, organisation, economy and ease of comprehension (5 points)

(B) Price sub-criteria

The price of the offer will be awarded a maximum of 100 points.

The price award criterion will be based on the total price for the service. The tender with the lowest price will receive the maximum number of 100 price points. All other tenders will receive a number of price points in relation to the tender offering the lowest price.

The points will be calculated according to the following formula:

Price points = (Lowest price x 100) / (Price of the respective tender)

Please note that we reserve the possibility to award the contract on the basis of the initial tender without negotiation.