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Please note that the information contained in this document is an extract of the Terms of Reference (ToR) and does not constitute the integral tendering documentation for this call for tenders.

The full tendering documentation (ToR and annexes) can be downloaded from the *Portail des marches publics* in the link available under the section for this call.

The only official tendering documentation (ToR and annexes) is the one published in the *Portail des marches publics*. The ESPON EGTC cannot be held responsible for any errors that may appear in the ToR published in its website or any other platform than the official *Portail des marches publics*.

In case of interest, you are invited to download the full tendering documentation from the *Portail des marches publics* and submit your tender via the same platform.

CORRIGENDUM:**NEW SUBMISSION DEADLINE: 23 April 2024 at 11h00 CET****Correction of Annex A – ESPD Part IV 1a) and 2a)****Call for tenders****Extract of the Terms of reference****ESPON European Research Project****“Strategic Autonomy Rules for Trade in European Regions (STARTER): between free trade agreements and Open Strategic Autonomy”****ESPON EGTC**

20 March 2024

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

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

Key Information on the Procurement

Title	Strategic Autonomy Rules for Trade in European Regions (STARTER): between free trade agreements and Open Strategic Autonomy
Procedure	EU Open
Contracting authority	ESPON EGTC 11, Avenue John F. Kennedy L-1855 Luxembourg Grand Duchy of Luxembourg
Type of contract	Service contract
Duration	27 months (24 months for contract implementation + 3 months for administrative closure)
Maximum available budget	EUR 700.000,00 (excluding VAT)
Place of delivery	Luxembourg
Lots	This tender is not divided into lots
Variants	Not permitted
Market access	Participation in this tender is open to all economic operators established in the European Union, the European Economic Area and third countries signatories to international agreements in the field of public procurement by which the EU is bound
Tender submission method	Electronic submission via the Luxembourg Public Procurement Portal (www.pmp.lu)
Deadline for sending requests for information And/or reporting errors, omissions, ambiguities, or discrepancies	16 April 2024 at 10h59 CET
Deadline for submission of tenders	23 April 2024 at 11h00 CET

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1 What is to be done? (Purpose of the contract)

The ESPON EGTC is launching an open call for tenders to further build up ESPON's stock of research and provide new European territorial evidence in the framework of the [ESPON 2030 Programme](#). The call for tenders shall result in a European research project being implemented within the framework of the Thematic Action Plan "European territories in global interactions".

1.1 Context

In 2021, the European Commission released their "Trade Policy Review" informing the European Parliament, the Council, the Economic and Social Committee (EESC) and the Committee of the Regions (CoR) on the concept of an open, sustainable and assertive trade policy, outlining the principles of the Open Strategic Autonomy (OSA)¹ in relation to trade.² The document demands a new trade policy of assertiveness and rules-based cooperation linking trade with EU's strategic interests, notably sustainability, fairness, resilience and competitiveness. On the one hand, the European Commission emphasises the necessity to ensure higher autonomy in strategic EU policies amidst the global shifts in geoeconomics. On the other hand, the European Commission acknowledges the value of open trade; the EU remaining the world's largest trader of agricultural and manufactured goods and services.

Against that backdrop, the "Trade Policy Review" considers free trade agreements (FTA) as a conduit of the OSA linking the EU regions with "like-minded partners" from the Asia-Pacific region, Latin America and Africa and engaging in cooperation in pursuit of EU's values and interests. "

In the opinion from March 2021 on the "Trade Policy Review", the CoR underlines that Europe must remain a strategic global actor that respects international rules".³ The EESC opinion on the same communication from the European Commission welcomes OSA and meanwhile underlines the importance for the EU to remain open particularly for the import of key commodities and advanced technology as well as the need to find the right balance between OSA and trade openness.⁴

These signs of vigilance in relation to the value of global value chains echo global concerns. The International Monetary Fund⁵ warns that the geoeconomic fragmentation replaces a longstanding effort of trade-led income convergence across borders, a process that may inflict significant damage on low-income regions (e.g., reducing economic opportunities, impeding poverty reduction or lowering living standards). Mitigating policies may cushion some of the negative effects but might not divert a period of output losses or even decreasing living standards, which is to be disproportionately felt by regions with "higher reliance on trade and thin buffers to respond to shocks".

¹ The think tank of the European Parliament defines the Open Strategic Autonomy as "the capacity to cope alone if necessary but without ruling out cooperation whenever possible."

² <https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=COM:2021:66:FIN>

³ <https://cor.europa.eu/en/our-work/Pages/OpinionTimeline.aspx?opId=CDR-3380-2020>

⁴ <https://www.eesc.europa.eu/en/our-work/opinions-information-reports/opinions/trade-policy-review-open-sustainable-and-assertive-trade-policy>

⁵ Aiyar, Shekhar et al (2023). Geoeconomic Fragmentation and the Future of Multilateralism. International Monetary Fund, SDN/2023/001

The absorption of the effects of trade-related OSA will inevitably confront policymaking on the ground. As OSA is expected to reshuffle regional income sources and dependencies, European regions are at the crossroads of different development pathways, confronted with the question how to maintain and increase the benefit from decades of trade liberalization and participation in global value chains in a changing global environment.

The tandem of OSA and FTA measures creates a two-layered shield, depriving territorial policymakers of a clear view on the impact of trade in the regions, in particular in relation to their competitiveness and ability to foster the digital and green transition of their economies.

Firstly, tariff and non-tariff barriers as well as resulting trade patterns alter e.g. access of regional markets to critical raw materials for the digital and green transition. The cross-regional and cross-sectoral ripple effects of changes in the supply chains and the degree of substitutability of key raw materials requires attention. Secondly, new trade patterns formalised through FTA have second-order effects, which have not been sufficiently and systematically studied. A recent example is the anticipated effect of the FTA with Mercosur on the agricultural sector with disproportionate magnitude in different regions. With both layers, the project seeks to respond to the need expressed by the CoR in their opinion on the “Trade Policy Review” from 2021, calling for *“...value chains to be mapped, with the involvement of the relevant regional bodies, in order to identify and reduce areas of dependence in strategic sectors and boost the resilience of the most sensitive industrial ecosystems, in particular in remote and isolated regions such as the outermost regions, and specific areas such as health, defence, space, food, digitalisation and critical raw materials.”* Exogenous supply and demand shocks in the context of OSA and FTA will affect regions differently depending on that region’s trade integration and its input-output sectoral linkages. Measuring the impact of these shocks requires the construction of different multipliers.⁶

1.2 Objective

The objective of this European research project is to deliver:

- analysis of the regional effects emanating from the policy of OSA through a set of minimum four scenarios dedicated to the European Critical Raw Materials Act (ECRMA)⁷ and minimum one extended scenario configuration, deriving from other OSA-related policies / instruments / measures aimed at an autonomous twin green and digital transition and anticipated to have substantial cross-regional and cross-sectoral effects (Task 1);
- analysis of the regional effects of a set of min. 4 scenarios emanating from FTA (Task 2);
- In-depth analysis of the territorial effects of OSA (Task 1) and FTA (Task 2) scenarios as well as of minimum one unexpected regional-sectoral shock unrelated to OSA and FTA in a set of minimum four regional-sectoral case studies. Regional policy analysis and recommendations. (Task 3);

Tenderers are expected to propose a method for analysing regional effects in Europe of shocks in global value chains. While the traditional gravity method is admissible, it is advisable to take into account the regional input-output data for Europe, updated to 2017 and extended to EU27, EFTA and UK by ESPON in close collaboration with the FIGARO team of the Joint Research Centre of the European Commission

⁶ As discussed in the case of Spain: [Spanish regions in global value chains: how important? how different? - Working Papers - Economic analysis and research - Publications - Banco de España \(bde.es\)](#)

⁷ https://single-market-economy.ec.europa.eu/publications/european-critical-raw-materials-act_en

(JRC). The methodology for the update and extension is recognised in the literature and by the JRC as the state-of-the-art. The successful tenderer will be given access to the full database described in the relevant literature.⁸at LINK. Alternative or complementary methods to regionalised input-output analysis that serve the research objectives and tasks can be proposed by the tenderer.

The changes in the regional competitiveness and in the ability to steer the twin digital and green transition because of exogenous shocks can be expressed by means of different parameters, e.g. GDP, GVA, employment (in tradable sectors), emissions, etc. Tenderers are invited to propose a set of parameters, which the project will consider as proxies for competitiveness and the twin digital and green transition.

1.3 Description of tasks

In pursuing the objectives and outputs outlined above, the following tasks shall be carried out. Tenderers are requested to describe how they intend to implement them, to include in their proposal a description of their foreseen organisation and planning, to detail the proposed deliveries and to explain how the necessary resources shall be broken down between the different tasks.

1.3.1 Task 1: Regionalised scenarios of the Open Strategic Autonomy

The project is expected to investigate the regional effects of OSA policies / instruments / measures reflecting the intentions to de-risk strategic unilateral dependencies, relevant for the twin digital and green transition. In this context, the focus is on the ECRMA. Annex 1 of ECRMA lists 16 raw materials with strategic importance for the green and digital transition as well as for other relevant OSA domains, including defence and space applications. The project is expected to identify alternative sources serving EU and EFTA countries with a specific strategic raw material⁹. The main output of this task is to analyse the regional-sectoral effects of changes in global value chains involving strategic raw materials in terms of changes in identified proxies for competitiveness and the twin digital and green transition. The tenderer is expected to identify at least one proxy for the parameters of interest, i.e. regional competitiveness, digitalisation and environmental sustainability (e.g. GDP, GVA, internet speeds, employment and carbon footprint¹⁰, etc). The tenderer is welcome to propose an analysis of all 16 items as per Annex 1 of ECRMA or a subset of materials expected to have the strongest ripple effects as a result of shocks in their global value chains. In the latter case, a justification on the selection is required.

A minimum set of four scenarios are to be tested, which derive from the 2030 benchmarks for diversification in the supply of strategic raw materials set in the regulation as follows:

- At least 10% of the EU's annual consumption for extraction,
- At least 40% of the EU's annual consumption for processing,
- At least 15% of the EU's annual consumption for recycling,

⁸

[The European regions in the global value chains: New results with new data - Almazán-Gómez - Papers in Regional Science - Wiley Online Library](#)

<https://publications.jrc.ec.europa.eu/repository/handle/JRC132883>

⁹ Tenderers are welcome to familiarise themselves with the Substitute Cost Parameter in Annex 2 of ECRMA.

¹⁰ These indicators serve as an example. Tenderers are expected to propose a set of indicators matching their own research design but serving as proxies for competitiveness, digitalisation, and environmental sustainability.

- Not more than 65% of the Union's annual consumption of each strategic raw material at any relevant stage of processing from a single third country.

Tenderers are welcome to use country-country-product statistics from international trade and consider quantitative substitution scenarios for different regions / sectors importing a strategic input, which may be fully or partly substituted by an alternative exporter of the same input. Qualitative substitutability of the material in relation to its physical and chemical properties and engineering value are not expected.

These scenarios are to be tested separately and jointly in the analysis of the regional-sectoral effects. In addition, tenderers shall propose at least one extended scenario configuration, deriving from other OSA-related policies / instruments / measures aimed at an autonomous twin green and digital transition and anticipated to have substantial cross-regional and cross-sectoral effects.

The below of list of policies / instruments / measures is indicative and non-exhaustive:

- Diversification of the supply of fossil fuels as energy source;
- the Carbon Border Adjustment Mechanism¹¹;
- the Anti-coercion Instrument¹²;
- the Export Control Regulation¹³.
- European Chips Act¹⁴

Accordingly, scenario configurations can include the diversification of supplies of strategic raw materials with other simultaneous shocks such as the diversification of the supply of fossil fuels through friendshoring, significant reduction of carbon leakage, foreign economic coercion and export controls of dual-use items. This configuration of the ECRMA scenarios is intended to explore constructive inference effects of simultaneous shocks deriving from OSA. Tenderers are expected to justify their selection of OSA shocks other than the four compulsory ECRMA scenarios.

Territorial level of analysis: min. NUTS-2.

1.3.2 Task 2: Regionalised scenarios of Free Trade Agreements

The main aim of this task is to explore the regional-sectoral effects of FTA serving the ECRMA diversification benchmarks. The project is expected to:

1. identify which of the alternative sources that can serve EU and EFTA countries with a specific strategic raw material¹⁵ are subject to EU / EFTA free trade agreements.
2. Investigate which concessions the EU / EFTA provide in exchange for preferential access to strategic raw materials. A recent example is the EU-Mercosur agreement regarded as beneficial for the EU diversification of rare earth supply chains but challenging for the EU agricultural regions.

¹¹ https://taxation-customs.ec.europa.eu/carbon-border-adjustment-mechanism_en

¹² https://ec.europa.eu/commission/presscorner/detail/en/IP_23_3046

¹³ <https://eur-lex.europa.eu/EN/legal-content/summary/dual-use-export-controls.html>

¹⁴ https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/european-chips-act_en#investments-to-support-the-chips-act

¹⁵ Annex 1 of ECRMA lists 16 raw materials with strategic importance for the green and digital transition as well as for other relevant OSA domains, including defence and space applications.

3. simulate the second-order effects of concessions at regional-sectoral level in terms of changes in identified proxies for competitiveness and the twin digital and green transition, e.g. GDP, GVA, employment and employment in tradable sectors, emissions, carbon footprint, internet speeds or any other relevant proxy of the effect on the digital transition, etc.

The task is expected to produce a minimum of four scenarios. Tenderers are invited to propose a focus on at least two FTA with at least two sectoral concessions, the regional-sectoral effects of which are to be analysed. It is advisable to focus on FTA, which are currently negotiated, renegotiated or in ratification process¹⁶¹⁷ and on sectoral concessions expected to have significant ripple effects throughout European regions and sectors.

Territorial level of analysis: min. NUTS-2.

1.3.3 Task 3: Policy implications and case studies

The task is composed of three layers:

1. Translating the findings from Task 1 and Task 2 into policy implications as a consequence of the exogenous shocks following OSA and FTA measures by means of an in-depth analysis of a set of regional-sectoral case studies.
2. Testing for an unexpected regional-sectoral shock, which significantly affects the regional resilience ability.
3. In collaboration with selected policymakers and practitioners linked with the regional-sectoral case studies, discussing the policy implications of the analytical findings on local strategies (e.g., policy-industry practices, smart specialisation, net-zero objectives, etc.), which affect the degree of vulnerability / resilience to the exogenous shocks.

The three layers shall translate into policy recommendations as a main output of the task. The territorial level of analysis is min. NUTS-2. The task involves GIS mapping.

Firstly, the task shall explore the regional-sectoral effects of scenarios explored under Task 1 and Task 2 in more depth.

The task is expected to deliver at least four regional-sectoral case studies, taking into consideration the most vulnerable and most resilient regions and sectors and answering the following research questions:

- Which strategic dependencies does the region exhibit: a) within the region across sectors and b) across regions and sectors?
- What changes in the selected proxies for regional competitiveness, digitalisation and environmental sustainability do ECRMA diversification benchmarks entail?
- Which are the most significant OSA policies / instruments / measures, other than the ECRMA diversification benchmarks, in terms of changes in the selected proxies for regional competitiveness, digitalisation and environmental sustainability?

¹⁶ https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/negotiations-and-agreements_en

¹⁷ <https://www.efta.int/free-trade/free-trade-agreements>

- Which territorial and sectoral characteristics explain the degree of dependency / vulnerability of the regional economy to shocks emanating from a) ECRMA diversification benchmarks and other OSA policies / instruments / measures and b) concessions in FTA?
- What changes in selected proxies for regional competitiveness, digitalisation and environmental sustainability do concessions in FTA entail for the region?
- Which other indicators conventionally used in regional studies change as a consequence of OSA-related shocks and second-order effects of FTA concessions?
- Do changes in the global value chains as a result of the above shocks bring about opportunities for the region? In which sectors?
- Are there contradictory effects observed at the national level considering FTA concessions? What is the aggregate welfare effect of the concessions on the national economy?

Secondly, the task shall secure capacity for one additional scenario of an unexpected regional-sectoral shock. Tenderers are welcome to propose a natural or anthropogenic type of shock, which significantly affects the regional resilience ability on top of the other OSA and FTA shocks.

Thirdly, the task necessitates collaboration with regional/local policymakers and practitioners linked with the regional-sectoral case studies to jointly assess policies and industrial conditions against the backdrop of the analytical findings of the project.

This layer of the task is designed to answer the following policy questions:

1. What strategy public authorities pursue to minimise strategic dependencies while maximising benefits from the regional position in the global value chains?
 - Do territorial / regional development / business internationalisation strategies take into account strategic dependencies and exogenous shocks in the context of OSA and FTA?
 - How does the region collaborate with other levels of government and industry to reduce region-sector vulnerabilities to exogenous shocks?
 - How prepared is the region for shocks in global value chains, notably in relation to the ECRMA diversification benchmarks and concessions in FTA?
 - How does the region engage with its traditional trading partners in this context?
 - How well-trained is the region in rapid transitions, e.g. historical experience with adaptive innovation, entrepreneurship, radical innovation?
2. What is the position of regional industrial leaders in relation to their preparedness and strategies to absorb the effects of the exogenous shocks in the context of OSA and FTA?
3. In view of increasing the degree of resilience / vulnerability to exogenous shocks (in the context of OSA and FTA), how should the following strategies / policies be adjusted?
 - Re-industrialisation policies.
 - Public-industry collaboration in the context of Sustainable Smart Specialisation Strategies.
 - Policies for structural change.
 - Regional attractiveness and business internationalisation policies.

4. Other related questions from the Steering Committee of the project.

Tenderers are expected to elaborate on their strategy to

- a) identify regional-sectoral case studies where relevant policy makers and practitioners can be mobilised.
- b) and propose an approach how to involve those policymakers and practitioners in a discussion about the policy implications of the analytical findings on their local strategies.

Taking into account that the selection of case studies will be influenced by the results of Task 1 and Task 2, tenderers are invited to make preliminary proposals in their technical offer demonstrating an understanding of the anticipated economic significance and consequently policy impact of a certain shock (i.e. ECRMA diversification benchmarks, at least one extended scenario configuration, deriving from other OSA-related policies / instruments / measures aimed at an autonomous twin green and digital transition as well as concessions in FTA) in a certain sector and region.

In the context of the ripple effects of ECRMA diversification shocks, it is advisable to take into account the strategic technologies identified by the JRC and their strategic raw material inputs¹⁸.

The proposed case studies and stakeholder involvement strategy shall respect the principles of replication and variation.

The variation refers to both, the degree of regional competitiveness, (e.g. at least two regions with GDP per capita less than 75% of the EU average and at least two regions with GDP per capita above 100% of the EU average¹⁹) and the effect of the exogenous shocks (i.e. at least two regions expected to experience positive vs. at least two regions expected to experience negative effects of the shocks in global value chains and/or concessions in FTA).

The selection shall yield at least the following combinations:

- Highly competitive region expected to experience negative effects of the ripple effects of OSA/FTA concessions;
- Highly competitive region expected to experience positive effects of the ripple effects of OSA/FTA concessions;
- Low-competitiveness region expected to experience negative effects of the ripple effects of OSA/FTA concessions;
- Low-competitiveness region expected to experience positive effects of the ripple effects of OSA/FTA concessions;

The case study selection shall be approved by the contracting authority that reserves the right to propose alternative one.

1.4 Expected outputs and deliverables

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

1.4.1 Expected outputs

The main outputs of the service shall be:

¹⁸ <https://op.europa.eu/en/publication-detail/-/publication/8e167f11-077c-11eb-a511-01aa75ed71a1/language-en>

¹⁹ These indicators serve as an example. Tenderers can propose own typologies or indicators approximating different degrees of competitiveness.

- Min. 4 scenarios of the regional-sectoral effects deriving from the ECRMA diversification benchmarks;
- Min. 1 scenario configuration for ECRMA with another OSA-related policy / instrument / measure;
- Min. 4 scenarios with a focus on at least two FTA with at least two sectoral concessions;
- Min. 1 scenario of unexpected regional-sectoral shock (unrelated to OSA and FTA);
- Min. 4 case studies of highly competitive and low-competitiveness regions with positive and negative effects of the shocks resulting from OSA and FTA concessions (Task 3).
- A set of maps at min. NUTS-2 level visualising the scenarios in terms of changes in identified proxies for competitiveness and the twin digital and green transition (e.g. GDP, GVA, employment and carbon footprint, etc).
- A set of policy analyses and recommendations for at least 4 regions.

Data and interactive maps and graphs resulting from the research and provided in the format compatible with the environment of the ESPON Portal²⁰.

1.4.2 Deliverables

The selected service provider is requested to submit at least 4 predefined deliverables, linked to foreseen payments in the contract (3 interim and 1 final payment):

- One inception deliverable
- Two progress reports
- One final deliverable

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

The technical offer shall indicate the time schedule for all other intermediary deliverables proposed by the tenderer.

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

1.4.2.1 Predefined deliverables

1. An inception deliverable containing at least:

- Report (approximately 30 pages, excluding annexes) including consolidated:
 - Literature-motivated study design;
 - Description of the methods to be applied.
 - Secondary data sources.
 - OSA-related policy / instrument / measure selected to extend the configuration of the four ECRMA diversification scenarios.
 - Proxies for competitiveness and the twin digital and green transition, applied in the simulations.

²⁰ <https://gis-portal.espon.eu/arcgis/apps/sites/#/espon-hub>

- Focus on specific FTA, concessions respectively sectors.
- Work plan presenting the next steps foreseen in the project's implementation, including meetings with selected target groups.
- Description of the format and content of the next intermediary deliveries.

2. A final deliverable containing at least:

- Final main report (up to 80 pages) including:
 - A short survey of the literature on the regional-sectoral effects of OSA policies and the second-order effects of FTA concessions within countries
 - Simulations and policy analysis of the regional-sectoral effects emanating deriving from ECRMA
 - Simulations and policy analysis of the configuration for ECRMA with another OSA-related policy / instrument / measure;
 - Simulations and policy analysis of the regional effects of concessions from strategically relevant FTA;
 - In-depth simulations for at least four case studies;
 - In-depth analysis of the endogenous environment including policies and industrial conditions, which moderate the effects of exogenous shocks.
 - policy recommendations.
- Individual case studies reports with in-depth analysis of regional-sectoral effects of the above scenarios and answers to the policy questions of Task 3;
- A set of tools dedicated to the case study regions including regional-sectoral policy recommendations and other tools that can support policy actions, e.g. institutional mapping, checklists, monitoring indicators, etc.²¹
- A set of maps at NUTS-2 level visualising the scenarios in terms of changes in identified proxies for competitiveness and the twin digital and green transition (e.g. GDP, GVA, employment and carbon footprint, etc);
- A policy brief (ca 10 pages) summarizing the key findings and the policy recommendations of the project.
- Scientific annexes, detailing the methodology and the research results including:
 - Positioning of the findings in the literature;
 - Methods applied;
 - Conventionalised reports of the simulated impacts.

²¹ See for example the tool list of the OECD project here: <https://www.oecd.org/fr/publications/l-internationalisation-et-l-attractivite-des-regions-francaises-6f04564a-fr.htm>

- Presentation of the research results in the format and specific form agreed with the ESPON EGTC (see detailed examples in footnote ²²) and – whenever related to maps and other interactive forms of data visualisation - compatible with the environment of the ESPON Portal
- Maps and figures:
 - Source files for the data, maps and figures (incl. map project/design and vector formats).
 - Shapefiles, geodatabase(s), for all the static and interactive web-maps, dashboards or apps.
 - Data gathered according to the ESPON metadata template, corresponding to the principles of ESPON data strategy and integration of the collected data in the ESPON database, in cooperation with the ESPON EGTC.

3. Two progress reports

In addition to the above, the service provider will be requested to submit two progress reports, corresponding to foreseen interim payments in the contract.

Those brief reports (max. 10 pages) shall provide an overview on the progress of the implementation of the project, highlighting the status of the different tasks and the challenges and risks associated for the good achievement of the research. Furthermore, the reports shall list the meetings held and the intermediate deliverables submitted between the progress reports.

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

1.4.2.2 Intermediary deliverables

In addition to the predefined deliverables, service providers are expected to provide intermediary deliverables. These can take different forms, depending on the profile and content of the requested tasks. Their exact quantity, format and content shall be proposed in the technical offer, then agreed between the ESPON EGTC and the service provider at the kick off meeting. They shall be submitted on a scheduled basis corresponding to the progress of the implementation of the different tasks described above (see sections 1.3).

While leaving freedom to the tenderers to define the intermediary deliverables in their technical offer, the following shall be considered:

- intermediary deliverables shall be planned throughout the project's life cycle and are expected in between each of the pre-defined deliverables.
- compulsory element of the intermediary deliverables are: the data resource that shall be steadily acquired processed and submitted to the ESPON EGTC, a detailed overview of the data collection process and data structure, and adjustments related to the data strategy when necessary (see dedicated section about data deliverable process below).

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

²² This involves the concise and easy-to-grasp summary of overall research findings in an analogue or digital format by means of (a non-exhaustive list of forms): policy brief, infographics, dashboard, story map, simple video clip, apps, etc.)

1.4.2.3 Data deliverable process and digital deliverables

Data and data visualisations are an integral part of all the above-mentioned deliverables. When it comes to data deliverables, it is important to document and provide associating metadata and all the data possible that would allow to reproduce the results. It is important to keep the potential reuse of data in mind when collecting and structuring them, therefore, detailed spatiotemporal granularity is important. Visualisations need to be adapted both for static representation in reports as well as interactive web-based content. The project is expected to deliver both static and interactive web-based maps and figures, when relevant also dashboards, applications or similar, suitable for ESPON website and Portal²³.

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

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

1.4.3 Common requirements for all deliverables

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

1.5 Project management

1.5.1 Mandatory meetings foreseen during the contract implementation

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

Most of these meetings are held online. In case of a physical meeting (up to 4 physical meetings shall be organised during the life time of the project), it will normally take place at the ESPON EGTC's premises in Luxembourg. However, physical meetings may also take place at other suitable locations, upon agreement between the service provider, the involved stakeholders if relevant and the ESPON EGTC.

Kick-off meeting

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

See: <https://gis-portal.espon.eu/arcgis/apps/sites/#/espon-hub>

Coordination meetings

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

Steering Committee meetings

Partnership and cooperation are central to the implementation of ESPON European research projects and are prerequisites for ensuring useful results and effective policy uptake. The successful accomplishment of the objectives of this project will be achieved by proactive participation between selected stakeholders, the ESPON EGTC and the service provider at every stage of the implementation.

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

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

- To closely follow and advise the implementation of the research, making sure that it meets both research objectives and policy demands;
- To discuss and give feedback to deliverables from the service provider and provide guidance for the subsequent steps of the research and service contract implementation;
- To discuss and agree upon how to deliver - at each stage of the implementation - the results of the research to selected target groups.

The composition of the Steering Committee is defined by the ESPON EGTC and communicated to the service provider. It comprises at least stakeholders of the territories for which case studies are expected, the service provider and the ESPON EGTC. Other external stakeholders (e.g. representatives of the [ESPON Monitoring Committee](#)) and/or relevant organisations may also take part in the Steering Committee.

Indicatively, four steering committee meetings shall be foreseen.

The first one shall take place ca. 1 month after the kick-off meeting, preferably as a physical meeting.

The timing and location of the other Steering Committee meetings will be discussed and agreed during the kick-off meeting and may be amended during the project implementation.

1.5.2 Indicative time schedule

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

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

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

Meetings	Predefined deliveries	Indicative deadline ²⁴
Kick-off		As soon as possible (and normally within 2 weeks) after the award of the contract
	Inception Delivery	T +1 months
1st Steering Committee		T + 2 months
	Progress report 1	T + 6 months
2nd Steering Committee		T + 9 months
	Progress report 2	T + 12 months
3rd Steering Committee		T + 15 months
	Final Delivery	T + 22 months
Final Steering Committee		T + 24 months

1.6 Competences and skills required

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

- Proven experience (at least five years) in international trade / international economics;
- Proven experience (at least five years) in regional policy analysis;
- Proven experience (at least five years) in impact assessment of policies;
- Proven experience (at least five years) in international trade predictions, e.g. gravity models;
- Proven experience (at least five years) in macroeconomic modelling and analysis, e.g. input-output analysis, Computable General Equilibrium models;
- Proven experience in impact analysis of tariff and non-tariff trade barriers and free trade agreements;
- Advanced GIS and web-based GIS, and data visualisation skills (QGIS, ArcGIS or equivalent) necessary for the production of maps in accordance with ESPON templates;

²⁴ The letter "T" in this table stands for the date of the kick-off meeting. Timeframes are indicative.

- Advanced data management, data quality checking, statistics, statistical programming skills (R, Python or equivalent).
- At least one member with a communication/journalistic background and experience in visualising and presenting research findings in an easy-to-grasp way.
- Team members shall demonstrate a very good linguistic ability to draft and communicate research findings in high-quality English.

(...)

End of extract

Consult www.pmp.lu for downloading the full tendering documentation from the Portail des marches publics and submit your tender via the same platform.