

HORIZON 2020
The Framework Programme for Research and Innovation



DigitalHealthEurope

Request for Twinning Tenders 2020

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1 Introduction and purpose of Twinning

1.1 The European Commission's Communication on enabling the digital transformation of health and care

The Digital Single Market (DSM) Strategy of the European Commission¹, backed up by its mid-term review in May 2017², recognised the beneficial role of digital technologies in transforming today's world, especially in several key policy areas, including health and care³.

In line with the DSM Strategy, the Council of the European Union adopted a set of conclusions on digital health⁴ in December 2017, inviting Member States and the Commission to work together to seize the potential offered by digital technologies in health and care. In response, the European Commission also published a Communication on “enabling the digital transformation of health and care in the Digital Single Market; empowering citizens and building a healthier society”⁵ (referred to hereafter as the Communication). The vision outlined in the Communication is *to promote health, prevent and control disease, help address patients' unmet needs and make it easier for citizens to have equal access to high quality care through the meaningful use of digital innovations. It will also strengthen the resilience and sustainability of Europe's health and care systems.* The Communication also lays out European Union (EU) actions in three priority areas (from here on called “priorities”) to be followed in the coming years:

- ▶ **citizens' secure access to and sharing of health data across borders** - enabling citizens to access their health data across the EU;
- ▶ **better data to advance research, disease prevention and personalised health and care** - allowing researchers and other professionals to pool resources (data, expertise, computing processing and storage capacities) across the EU;
- ▶ **digital tools for citizen empowerment and person-centred care** - using digital tools to empower people to look after their health, stimulate prevention and enable feedback and interaction between users and healthcare providers.

The main purposes of this important policy document and its three key priorities are outlined in Figure 1. Various key initiatives have already started to take concrete action and address different aspects of these priorities, but these key initiatives do need to work together in order to boost the envisioned digital transformation of health and care (DTHC). This includes joining up their efforts on research and innovation (in line with activities supported by Horizon2020 (H2020)) as well as political coordination, stakeholder mobilisation, deployment and uptake of digital solutions for health and care. Sections 1.2 and 1.3 briefly outline the role of the DigitalHealthEurope project and its Twinning programme in addressing these challenges and supporting the objectives and priorities outlined above.

¹ COM(2015) 192 final, Brussels, 6.5.2015
http://europa.eu/rapid/attachment/IP-15-4919/en/DSM_communication.pdf

² COM(2017) 228 final, Brussels, 10.5.2017
<https://ec.europa.eu/transparency/regdoc/rep/1/2017/EN/COM-2017-228-F1-EN-MAIN-PART-1.PDF>

³ Transformation of Health and Care in the Digital Single Market:
<https://ec.europa.eu/digital-single-market/en/policies/ehealth>

⁴ 14078/17 SAN 399 TELECOM 272 DATAPROTECT 177, Brussels, 28.11.2017
<http://data.consilium.europa.eu/doc/document/ST-14078-2017-INIT/en/pdf>

⁵ COM(2018) 233 final, Brussels, 25.04.2018
https://ec.europa.eu/health/sites/health/files/ehealth/docs/com2018_233_en.pdf

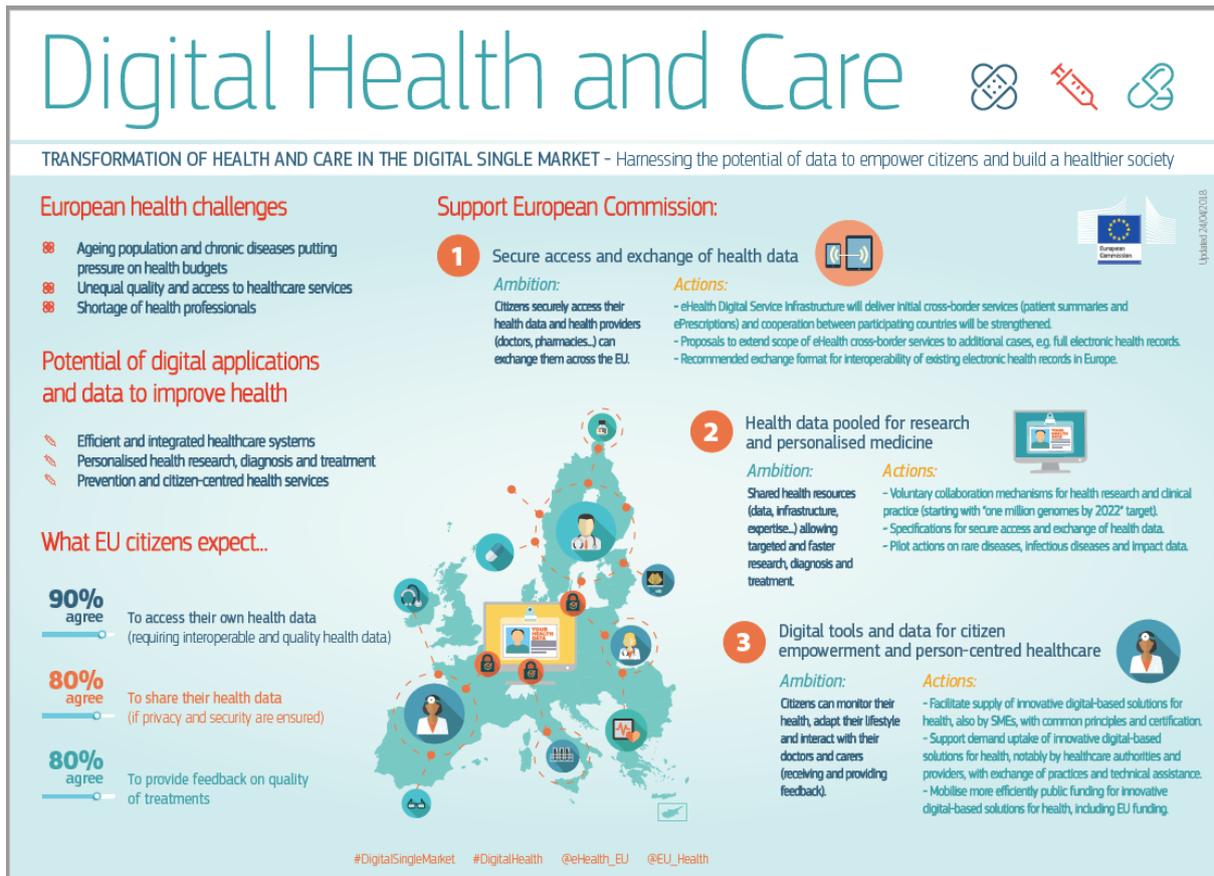


Figure 1. EC infographic on the transformation of health care in the Digital Single Market

1.2 DigitalHealthEurope’s role in supporting the objectives of the Communication

DigitalHealthEurope is a Coordination and Support Action funded by the European Commission (EC) under the H2020 programme, with Grant Agreement No. 826353. The project is coordinated by empirica Technology Research and comprises 17 partners from across Europe. It runs from January 2019 to December 2020.

DigitalHealthEurope provides comprehensive, integrated and centralised support to initiatives on digital health and care innovation in the context of the DSM Strategy. The project's approach involves actions that will boost innovation and advance the Communication’s three overall priorities for the digital transformation of health and care, as described in the previous section.

To achieve these three priorities, the project work plan offers two forms of support:

Support to large scale deployment of digital solutions for person-centred care

DigitalHealthEurope's main objective is to facilitate the deployment of digital solutions for person-centred care. Assessment tools will be used to identify, analyse and select successful initiatives which are highly impactful and replicable, can be easily adapted to different contexts, and which can benefit from further support, such as providing structured advice on EU funding instruments and financing sources.

The selected initiatives will have the opportunity to pursue replication and scaling-up. This will be done with the aid of instruments such as twinning matchmaking via a marketplace and the Twinning Programme presented in this document.

Insights from the initiatives and from the twinning actions will contribute to a centralised deployment support service which will include guidelines, checklists and documented successful approaches.

These results will contribute to capacity building of Twinning Adopter(s) and elaboration of useful resources (“building blocks”) for the scaling-up of innovative practices - new resources that will be available to the various stakeholders engaged in scaling up digital tools for person-centred care. The aim is to encourage even wider uptake of twinned digital innovation and assimilate lessons learned.

Support to DTHC innovation through collaboration with key stakeholders

DigitalHealthEurope will also facilitate the creation of a collaboration platform that directly addresses the three priorities for the digital transformation of health and care. It can be considered as a multi-stakeholder community.

The outcomes will include collaboration agreements, the drafting of a common agenda and actionable recommendations that guide and inform decisions pursued at the policy level.

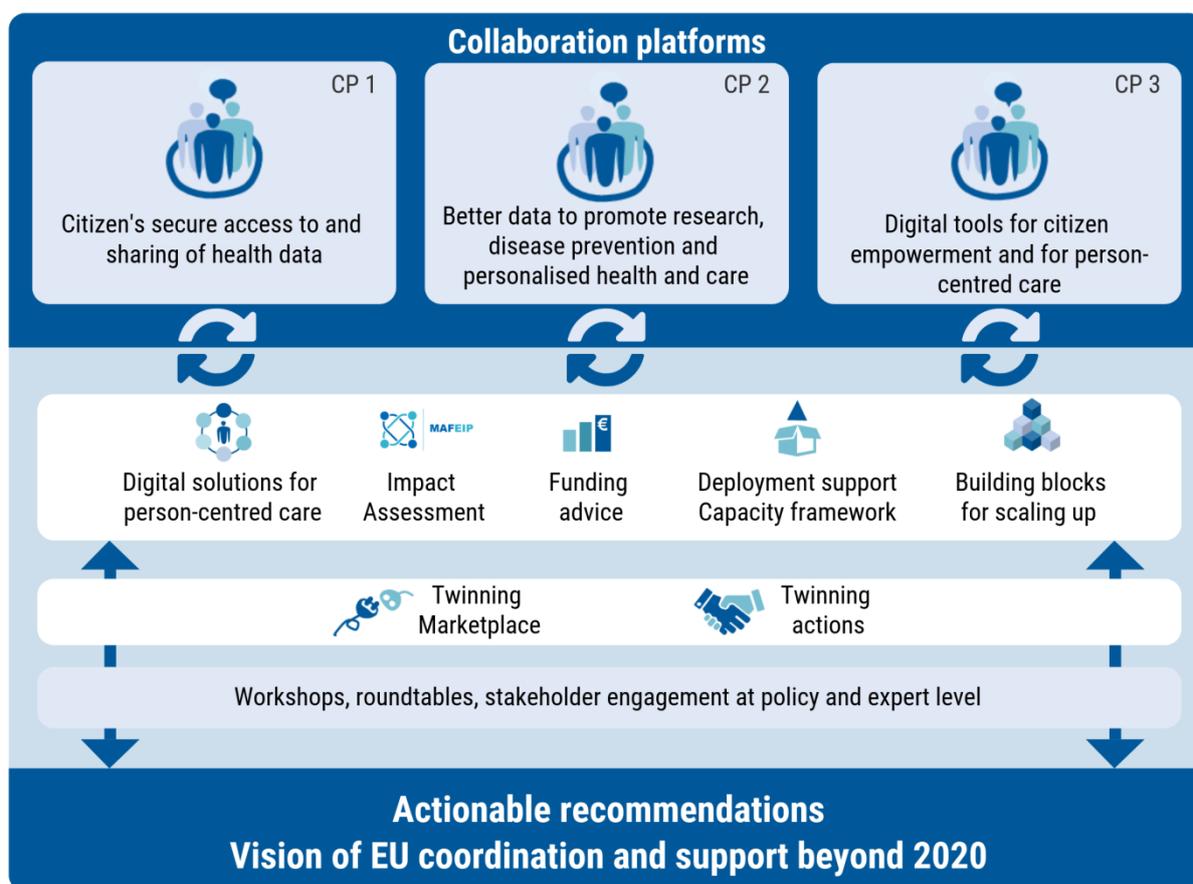


Figure 2. Overview of DigitalHealthEurope activities

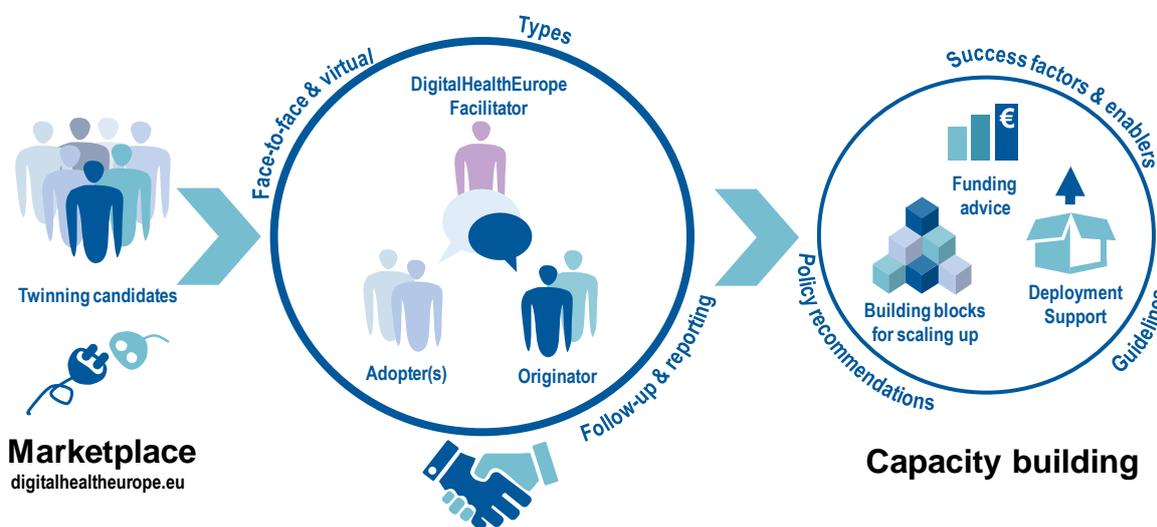
1.3 The DigitalHealthEurope Twinning Programme

In DigitalHealthEurope, the twinning programme is a support mechanism for scaling up innovative digital solutions. Twinning actions are used as a mechanism for accelerating fulfilment of the Communication’s priorities, by enabling the transfer of innovative solutions from one European region or country to another. An overview of the twinning concepts is outlined in Figure 3.

The approach has been successfully applied in a number of EU projects and studies, including the ScaleAHA study⁶, which funded 20 twinings. The region/country with the innovative practice is called a **Twining Originator**, and the implementing region/country is referred to as a **Twining Adopter**. There can be more than one Twining Adopter per twinning. In some cases, third parties may be involved, e.g. as an external facilitator or as tenderer/Twining Contractor. Every Twining Adopter must be in the European Union.

Interested organisations and individuals will first exchange ideas on **twining solutions** which they can offer or would like to adopt. A **twining marketplace** has been set up by DigitalHealthEurope to facilitate the matchmaking process. Potential Twining Originators can post information about their available twinning solutions, and those wishing to be Twining Adopters can specify their solution requirements.

The outputs of the twinning are expected to inform key work areas of DigitalHealthEurope, such as elaboration of policy recommendations and development of useful resources (“building blocks” for scaling up innovative solutions). These are a crucial part of the capacity building of European health and care institutions.



DigitalHealthEurope Twinning Concepts

Figure 3. Overview of DigitalHealthEurope twinning concepts

Twinning Activities may include, for example, hosting meetings, organising technical groups, travelling, acquiring licenses, paying fees for professional services. Twinning typically last up to ten months, depending on complexity and Twining Type.

A first twinning scheme was launched by DigitalHealthEurope in summer 2019, the results of which can be found here: <https://digitalhealtheurope.eu/twinning/digitalhealtheurope-call-for-twinning-june-august-2019.html>

1.4 Collaboration with the 2020 edition of the EIP on AHA twinning scheme

Building on the ScaleAHA twinings, the European Innovation Partnership on Active and Healthy Ageing (EIP on AHA) launched a first twinning scheme in 2019 concretely focusing on supporting the Communication objectives in the domain of active and healthy ageing.

⁶ <http://www.scale-aha.eu/home.html>

The EIP on AHA 2020 twinning scheme edition has teamed up with DigitalHealthEurope to amplify the synergies of the two initiatives and provide a joint twinning scheme, focusing on an EIP on AHA twinning strand part of this Request for Twinning Tenders.

This strand targets EIP on AHA Reference Sites - regional organisations that are engaged in the works of the EIP on AHA by means of "Individual Commitments" or "Collaborative Commitments" and holding Reference Site status as a result of the 2019 call. Twinning in DigitalHealthEurope and EIP on AHA

This section outlines what types of digital solutions might be expected to be covered by the tenders for twinning; what types of twinning exist; the twinning marketplace and its role; the overall funding budget and distribution; and the twinning outputs.

1.5 Expected Digital Solutions to be covered by Twinning

The innovative digital solutions whose adoption in a new region can be supported through DigitalHealthEurope twinning must be related to one or more of the three priorities defined in the Communication, namely:

- ▶ citizens' secure access to and sharing of health data across borders
- ▶ better data to advance research, disease prevention and personalised health and care
- ▶ digital tools for citizen empowerment and person-centred care.

A tender for twinning (i.e., an application made by a tenderer) must specify the twinning solution(s) to be addressed and how it relates to one or more of the overall priorities.

Twining Solutions are the digital know-how which is transferred through the twinning activities to the Twining Adopter. They may be products, services, processes, methodologies, strategies and/or business models. The topics must be based on digital technologies. They must be innovative⁷ and should not have been used in the adopting region(s) before the twinning takes place.

The following three non-exhaustive lists relate to each of the three priorities stated in the Communication. They serve to provide guidance to tenderers on what topics the proposed twinning are expected to address. The lists name between 7-20 different digital solutions. The lists do not preclude submission of proposed twinning relating to other topics linked to the three priorities.

Note: the three priorities are numbered for ease of reference. No prioritisation of the importance of the digital solutions listed is implied within or across the three priorities.

Priority 1: Citizens' secure access to and sharing of health data across borders

- ▶ Citizens' secure access to their health data - e.g., via secure online portal, citizen' access to an Electronic Health Record (EHR), a Personal Health Record (PHR) incl. telemonitoring data and shared with health professionals
- ▶ Interoperable electronic health records deployed at national and regional level enabling citizens' secure access to and sharing of health data; General Data Protection Regulation (GDPR) compliant, secure health data exchange
- ▶ Citizen-enabled sharing of health data across borders: patient summary and/or ePrescription, discharge letter, medical images, lab results
- ▶ Citizen-controlled data governance, health data cooperatives, health data donation

⁷ Innovation here is used to refer to a product, service, process, methodology, strategy, business model as described in https://ec.europa.eu/growth/industry/innovation_en. For the novelty aspect of innovations, please refer to the definition here: <https://ec.europa.eu/eurostat/statistics-explained/index.php/Glossary:Innovation>

- ▶ Other: please specify

Priority 2: Better data to promote research, disease prevention and personalised health and care

- ▶ Digital infrastructure for personalised medicine, -omics databanks, biomedical infrastructures
- ▶ Good practice in digital genomics, incl. whole genome sequencing
- ▶ Use of real-world data (RWD), data quality assessment and improvement
- ▶ Health data analytics (Artificial Intelligence, algorithm development and calibration, machine learning, risk stratification tools, etc.)
- ▶ Big data analysis, particularly for preventive medicine and treatment
- ▶ Health data donation, public preference models on data use for research
- ▶ Interoperability of disease registries including for rare diseases, data aggregation and sharing across borders, incl. at EU level
- ▶ Digital tools for public health, epidemiology, pharmacovigilance, clinical research, incl. reuse of EHRs for clinical research
- ▶ Other: please specify

Priority 3: Digital tools for citizen empowerment and for person-centred care

Citizen/patient-focused solutions:

- ▶ Digital tools to support health education (health literacy), digital health literacy
- ▶ mHealth systems, wearable devices for monitoring and prevention, alerts, reminders
- ▶ Digital tools to support patient feedback and reporting of outcomes and experiences
- ▶ Digital tools to support proactive prevention, self-management, homecare, telemonitoring
- ▶ Tele-mentoring/coaching, virtual consultations, virtual coach, personal assistant
- ▶ ICT supporting adherence to medication and care plans
- ▶ Robotics (e.g., companion robots)
- ▶ Tools and services supporting independent living, ambient assisted living technologies, telecare
- ▶ Other: please specify

Care practitioners' solutions

- ▶ Advanced digital tools to support Integrated Care, including integration of health and social care services
- ▶ Interoperable digital solutions to support person-centred and integrated care
- ▶ Regional and national Electronic Health Record (EHR) systems and ePrescription solutions enabling person-centred care
- ▶ Regional, national and local Electronic Integrated Care Record (EICR) systems, integration of EHR and social care records
- ▶ Digital shared care plan (e.g., support to multi-disciplinary team(s))
- ▶ Decision support for multi-morbidity and polypharmacy management
- ▶ ICT support for management of frailty
- ▶ ICT support for falls prevention
- ▶ eLearning to support workforce development for person-centred integrated care
- ▶ Other: please specify

1.6 Twinning Types

Twinnings can be grouped into **three types**. They range from knowledge exchange to adoption (whether partial or full) of the transferred solution. The different twinning types require different forms of funding, have different deployment time frames and need different experts.

- ▶ **Knowledge exchange and training:** This type of twinning mainly targets local authorities which do not have much experience with EU networking but are eager to learn from experiences in other parts of Europe. The twinning is seen as a first step to discuss a concrete solution (product, service, methodology) and how it can be transferred to the adopting region(s). The capacity needed is built during the twinnings. This includes identification of appropriate staff, setting up a process roadmap, defining expected outcomes, etc.
- ▶ **Partial adoption:** Twinnings that undertake partial adoption of a digital solution will have to provide concrete evidence on impact of the adoption, as well as the reasons why a full adoption is not possible (e.g. different healthcare systems, organisational differences, reimbursement issues, etc.).
- ▶ **Full adoption:** This type of twinning mainly targets local authorities with well established relations with other authorities in Europe (e.g. through memorandums of understanding, past EU project partnerships, etc.), that have already planned collaboration on a specific topic/solution and have made first steps, such as adaptation. The twinning aims to achieve a full adoption of the solution in the adopting region(s) using local infrastructure (including adaptation) or the Twinning Originator's infrastructure.



Figure 4. Twinning Types in DigitalHealthEurope

1.7 Twinning marketplace

To facilitate the forming of twinnings, DigitalHealthEurope offers an online twinning marketplace. On it, Twinning Originators can post information about their available Twinning Solutions, and Twinning Adopters can specify their requirements, enabling matchmaking and preparation of a twinning tender.

The twinning marketplace can be accessed via <https://digitalhealtheuropa.eu/twinnings.html>.

Participation in the marketplace is not a prerequisite for participation in this call. Nevertheless, potential twinning tenderers are encouraged to use the service so as to ensure the greatest possible transparency and openness about twinning availability throughout Europe.

1.8 Funding budget and budget distribution

The total budget for all twinnings to be funded in this call is €399,000.

Twinning contracts will be awarded based on the available budget, i.e. contracts will be awarded until the remaining budget is insufficient to fund the next best twinning tender that has passed the evaluation threshold. The exact number of twinings finally awarded will thus depend on the prices offered and the number of twinning tenders that pass the evaluation.

The maximum allowed budgets for each twinning type are specified in Table 1, which outlines the distribution of the budget across the three types of twinings.

Note that the maximum allowed for Twinning Subcontracting is not additional: it should be included in the maximum cost of one twinning.

Table 1. DigitalHealthEurope Call for Twinning Tenders funding framework

Twinning type	Expected no. of twinings	Maximum cost of one twinning for all three cost categories	Maximum for the category of Twinning Subcontracting
Knowledge exchange & training, digital skills	13	€5,000	0
Partial adoption	7	€17,000	€12,000
Full adoption	5	€43,000	€22,500

In addition to the DigitalHealthEurope Call for Twinning, the EIP on AHA twinings call is expected to fund up to 5 twinings with up to €5,000. The EIP on AHA twinning call follows different requirements and deadlines, documented in a dedicated call available at https://ec.europa.eu/eip/ageing/news/eip-aha-twinings-2020-receive-%E2%82%AC-5000-facilitate-deployment-large-scale-innovative-digitally_en.

1.9 Twinning calendar

Table 2 presents the planned twinning calendar. If for any reason changes to dates or activities are required, the call documents will be updated at digitalhealtheurope.eu.

Table 2. Twinning calendar

Date	Activity
26.02.2020	Publication of the Call for Twinning Tenders documents on digitalhealtheurope.eu
12.03.2020	Webinar 1 for tenderers (expected date)
08.04.2020	Webinar 2 for tenderers (expected date)
10.04.2020	Deadline for questions by tenderers
04.05.2020	Deadline for submission of twinning tenders
22.05.2020	Award decision and notification
June 2020	Twinning Contracting
01.07.2020	Start of twinning activities for all twinning types (= M1)
31.12.2020	End of twinning activities for “Knowledge exchange and training”
28.02.2021	End of twinning activities for “Partial adoption”

30.04.2021	End of twinning activities for “Full adoption”
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Note: All work related to a twinning shall be completed at the latest one month before end of the DigitalHealthEurope Grant Agreement.

During the twinning, twinning participants will be expected to attend two webinars organised by DigitalHealthEurope focusing on capacity building.

Questions about the Request for Twinning Tenders can be submitted in English to twinning@digitalhealtheuropa.eu within the deadlines specified in the time schedule.

The summary of all questions and answers posed will be presented in an anonymised question and answer (Q&A) document that will be published on the www.digitalhealtheuropa.eu portal in the English language or sent to the persons who have downloaded the tender documents.

Unless otherwise instructed, do not use any other contact email address or contact any other persons in connection with this Request for Twinning Tenders.

1.10 Twinning outputs

Table 3 describes the objectives of the twinning, their associated output and the tasks to be carried out (i.e., milestones and deliverables) for each twinning type.

Table 3. Twinning outputs expected per twinning type

Knowledge exchange & training, digital skills				
Objectives		To pursue knowledge exchange and training activities in which the Twinning Originator shares relevant knowledge and skills with Twinning Adopter(s) on a Twinning Solution new to the Adopter(s), leading to improved capacity of the Twinning Adopter(s) to address the topic in a better, more informed way in their respective region(s).		
Output		The Twinning Adopter(s) is/are enabled to address the twinning topic in its/their region(s), including developing and applying a concrete plan of action informed by the twinning experiences on how the acquired knowledge is used to tackle the topic during and beyond the twinning duration.		
Milestones and deliverables		By when?	How?	Output
D1.1	Twinning inception report	M2	Sent by email to Acting Procurer	Updated workplan taking into account any evaluation comments
D1.2	Twinning interim report and publishable interim summary	M4	Sent by email to Acting Procurer	Report template provided by Acting Procurer is completed
D1.3	Twinning final report and final publishable summary	M6	Sent by email to Acting Procurer	Report template provided by Acting Procurer is completed
Partial adoption				
Objectives		To implement a mature innovation owned by the Twinning Originator by taking innovative elements or aspects of it and using them to develop new or improve existing local solutions (product, service, process, methodology, strategy, business model) enabling the innovation to be used in the Twinning Adopter regions(s).		
Output		The Twinning Adopter(s) is/are enabled to implement innovative elements or aspects of the Twinning Originator's innovation into new or existing local solutions, with the latter being actively used by their intended audiences at the end of the twinning.		

Milestones and deliverables		By when?	How?	Output
D1.1	Twining inception report	M2	Sent by email to Acting Procurer	Updated workplan taking into account any evaluation comments
D1.2	Twining interim report and publishable interim summary	M5	Sent by email to Acting Procurer	Report template provided by Acting Procurer is completed
D1.3	Twining final report and final publishable summary	M8	Sent by email to Acting Procurer	Report template provided by Acting Procurer is completed
Full adoption				
Objectives	To implement a mature innovation owned by the Twining Originator in its full scope in a new or existing solution, enabling the innovation to be used in the Twining Adopter regions(s).			
Output	The Twining Adopter(s) is/are enabled to implement in full the Twining Originator's innovation into new or existing local solutions, with the latter being actively used by their intended audiences at the end of the twinning.			
Milestones and deliverables		By when?	How?	Output
D1.1	Twining inception report	M2	Sent by email to Acting Procurer	Updated workplan taking into account any evaluation comments
D1.2	Twining interim report and publishable interim summary	M6	Sent by email to Acting Procurer	Report template provided by Acting Procurer is completed
D1.3	Twining final report and final publishable summary	M10	Sent by email to Acting Procurer	Report template provided by Acting Procurer is completed
D1.4	Promotional video	M10	Shared with Acting Procurer via suitable cloud application	Video showcasing the adopted solution (max. 5 minutes in length)

2 Information on tendering

This section includes general information on the objectives of the tendering process and tenderer conditions.

2.1 General information and objectives

The focus of twinning is on local, regional and national health and care providers in Europe that wish to adopt innovative solutions which are available for transfer from another local, regional and national health and care provider in Europe.

Twinning activities must involve the transfer of digital know-how to at least one Twinning Adopter region from another region or organisation (Twinning Originator). Twinning Originator and Twinning Adopter(s) must be from different countries.

An organisation may participate in more than one twinning tender, so long as the twinning solutions and the twinning activities are both significantly different.

2.2 Contractual conditions

A twinning tender must be submitted by a single organisation willing to become Twinning Contractor. A Twinning Contractor can be a Twinning Originator, a Twinning Adopter region or a Third Party. Successful tenderers will be offered a Twinning Contract by the Acting Procurer⁸.

To conform to Commission rules on the size of overall subcontracting in the DigitalHealthEurope project, support to twinning activities is provided in three categories of cost, associated with different contractual and payment procedures. In particular, support can be requested for those costs which can be invoiced directly to the Acting Procurer and which conform to the H2020 eligibility rules for the categories entitled "personnel" and "other direct costs". These cost categories are referred to as Twinning Personnel and Twinning Direct Costs respectively. The details of each contractual condition are outlined below.

Twinning Personnel

For Twinning Personnel, the Twinning Contractor must provide, in the tender application, the details of individuals foreseen to contribute to its twinning activities and be able to conclude a contract directly with the Acting Procurer⁹. Contracts with Twinning Personnel, see the details of TD5 outlined in section 3.3, are designed to conform to the Horizon 2020 eligibility rules for personnel of the Acting Procurer. The qualifications and experience of each proposed individual must be given in the tender along with the proposed day rate. Day rates must be accepted by the Commission as eligible for personnel directly contracted by the Acting Procurer. Day rates of up to € 800 for qualified and experienced personnel may be acceptable. If individuals cannot be named as they have not yet been identified, sufficient details must be provided to show an individual's role and contribution along with a description of how and when the individual is to be recruited.

Twinning Direct Costs

For Twinning Direct Costs, tenderers may request funds to meet costs such as travel costs and other costs which can be invoiced to the Acting Procurer, conforming to Horizon 2020 eligibility rules for the Acting Procurer's use of this cost category in financial submissions.

⁸ Acting Procurer is empirica Gesellschaft für Kommunikations- und Technologieforschung mbH, co-ordinator of the DigitalHealthEurope project with Grant Agreement Nr. 826353

⁹ A direct contract between each individual concerned and the Acting Procurer must be put in place. The contract cannot be with an organisation.

Many service contracts and contracts for software development may not qualify as Twinning Direct Costs. Capital expenditure is not possible, the leasing of capital equipment may be an option if the cost of leasing is less than or equal to the depreciation of the capital cost.

Twining Subcontracting

Twining Contracts can be used directly to cover payment for the third category, for items in the cost category "Twining Subcontracting". Twining Subcontracting is a fixed sum due on completion of the twining activities and acceptance of the invoice for funding by the Commission. Twining Subcontracting can cover not only subcontracting taking place for the twining itself, but also other costs incurred by Originator and Adopter(s) which cannot be invoiced directly to the Acting Procurer either as Twining Personnel or Twining Direct Costs. Twining Subcontracts will contain appropriate verification of these costs and a payment plan will be aligned to the acceptance of twining deliverables by the project and invoices by the Commission. An outline contract is provided as TD4.

Proper implementation of Twining Contracts will be monitored periodically and reviewed against the expected outcomes (deliverables, milestones, output or results). Each Twining Contractor will be assigned a main contact person and supervisor from among the DigitalHealthEurope partners.

2.3 Content of the tender and submission process

Twining tenderers shall submit twining tenders electronically no later than the dates specified in the twining calendar. They should take full account of all the tender documents which must be downloaded from the project website <https://digitalhealtheurope.eu/> after completion of a short online identification form.

List of tender documents:

- ▶ TD0 – Request for Twining Tenders (this document)
- ▶ TD1 – Tender application template – Administrative section
- ▶ TD2 – Tender application template – Technical section
- ▶ TD3 – Tender application template – Financial section
- ▶ TD4 – Twining Contract (draft subcontracting agreement with Acting Procurer)
- ▶ TD5 – Twining Personnel Contract (draft contract with Acting Procurer)

Note: TD4 and TD5 may need to be further adapted to Horizon 2020 eligibility rules.

The following documents must be submitted as part of the tender: TD1, TD2, TD3.

An email must be sent to twinnings@digitalhealtheurope.eu by the deadline specified in the time schedule. The email must contain three searchable PDF attachments, clearly named (e.g. DHE_TD1_NameOfTwining.pdf)

Any questions on the request for tender, tender documents or tendering process must be sent to twinnings@digitalhealtheurope.eu before the deadline set in the timeline in this document.

Tenders that do not comply with the formal requirements described in this section will be rejected.

Tender templates

The tender application templates must be used when preparing the tender.

Administrative section

1. The legal entity form must be provided by the Twining Contractor. Example forms are available at https://ec.europa.eu/info/publications/legal-entities_en.

The Twinning Originator and at least one Twinning Adopter must also provide a completed legal entity form.

2. Exclusion criteria apply. The exemption of the tenderer to any of the exclusion grounds contained in section 4.1 of this document shall be proven by means of the types of evidence referred to in that section.
3. The fulfilment of the tenderer of the selection criteria contained in section 4.1 of this document shall be proven by means of the types of evidence referred to in that section.
4. The fulfilment of the tenderer to the compliance criteria contained in section 4.1 of this document shall be proven by means of the types of evidence referred to in that section.
5. The documentation to be included in the administrative section must be submitted in the English language.

Tenderers may be requested to provide additional information and/or evidence.

Technical section

The twinning tender must include a detailed technical offer which describes the three categories of excellence, impact and implementation of the proposed twinning. The technical section has a page limit according to Twinning Type.

Further details are available in the Technical tender template.

Financial section

The twinning tender must include a detailed financial offer broken down into binding prices according to the categories: Twinning Personnel, Twinning Direct Costs and Twinning Subcontracting. The total of the three categories of cost may not exceed the maximum for the proposed Twinning Type, and the total of the Twinning Subcontracting category may not exceed the maximum set - see Table 1.

▶ Twinning Personnel

For Twinning Personnel, details of each individual foreseen to contribute to twinning activities and able to conclude a contract directly with the Acting Procurer must be provided. The qualifications and experience of each proposed individual must be given along with the number of person-hours due to be worked and the fee per hour. For individuals who cannot be named, sufficient details must be provided.

▶ Twinning Direct Costs

For Twinning Direct Costs, details of each item or type of item, each set of travel plans etc. and other costs which can be invoiced to the Acting Procurer and conform to Horizon eligibility rules.

▶ Twinning Subcontracting

Any work to be subcontracted must be clearly described, as must each item of other cost for which funding is requested. Costs which meet the criteria for Twinning Personnel or Twinning Direct Costs may not be included in this category. The maximum identified for subcontracting in Table 1 may not be exceeded.

2.4 Other tender conditions

Confidentiality

Tenderers must keep confidential any information obtained in the context of the tender procedure (including EU-classified information¹⁰).

Language

Tenders, as well as outcomes in the form of deliverables must be submitted in English.

The twinning language is English and the twinning contract must be signed in its English version.

Communication (relating to either the tender procedure or the implementation of the twinning contract) must be carried out in English.

With the submission of their tender applications, twinning tenderers accept these requirements.

Cancellation of the tender procedure

The Acting Procurer may, at any moment, cease to proceed with the tender procedure and cancel it. The Acting Procurer reserves the right not to award any contracts at the end of the tender procedure. The Acting Procurer is not liable for any expense or loss the twinning tenderers may have incurred in preparing their application.

¹⁰ Commission Decision 2015/444/EC, Euratom of 13 March 2015 on the security rules for protecting EU-classified information

3 Evaluation and award

This section outlines the various exclusion criteria pertinent to a tender; the award criteria and their maximum thresholds; the ranking of twinning tenders; and the selection process

3.1 Exclusion, selection and compliance criteria

Table 4. Overview of exclusion, selection and compliance criteria

Criteria type	Definition	Evidence
Exclusion	A) Conflict of interest	Administrative section
	B) Exclusion grounds as defined in Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014	
Selection	C) Ability to perform the twinning activities	
Compliance	D) Compliance with the scope of the twinning call, including conformance with the definition of twinning solutions as defined in section 2.1	
	E) Compatibility with other public financing	
	F) Compliance with ethics and security requirements	

A) Conflict of Interest

A tenderer who is subject to a conflict of interest may be excluded. If there is a potential conflict of interest, a tenderer must immediately notify the Acting Procurer in writing.

A conflict of interest is any situation where the impartial and objective implementation of the evaluation of tenders and/or implementation of the Twinning Contract is compromised for reasons relating to economic interests, political or national affinity, family, personal life (e.g. family of emotional ties) or any other shared interest.

Note: If an actual or potential conflict of interest arises at a later stage (i.e. during the implementation of the Twinning Contract), the contractor must contact the Acting Procurer, who will notify the EC and take steps to rectify the situation. The EC may verify the measures taken and require additional information to be provided and/or further measures to be taken.

B) Exclusion grounds as defined in Directive 2014/24/EU of the European Parliament and of the Council of 26 February 2014

Grounds relating to criminal convictions

A tenderer will be excluded if it has been the subject of a conviction by final judgement for one of the following reasons:

- ▶ Participation in a criminal organisation, as defined in Article 2 of Council Framework Decision 2008/841/JHA;
- ▶ Corruption, as defined in Article 3 of the Convention on the fight against corruption involving officials of the European Communities or officials of Member States of the European Union and Article 2 of Council Framework Decision 2003/568/JHA (34), as well as corruption as defined in the national law of the lead procurer or the economic operator;

- ▶ Fraud within the meaning of Article 1 of the Convention on the protection of the European Communities' financial interests;
- ▶ Terrorist offences or offences linked to terrorist activities, as defined in Articles 1 and 3 of Council Framework Decision 2002/475/JHA, respectively, or inciting or aiding or abetting or attempting to commit an offence, as referred to in Article 4 of the aforesaid Framework Decision;
- ▶ Money laundering or terrorist financing, as defined in Article 1 of Directive 2005/60/EC of the European Parliament and of the Council;
- ▶ Child labour and other forms of trafficking in human beings as defined in Article 2 of Directive 2011/36/EU of the European Parliament and of the Council.

The obligation to exclude a tenderer shall also apply where the person convicted by final judgement is a member of the administrative, management or supervisory body of that tenderer or has powers of representation, decision or control therein.

Grounds relating to the payment of taxes or social security contributions

A tenderer shall be excluded from participation in the twinning where the Acting Procurer is aware that the tenderer is in breach of its obligations relating to the payment of taxes or social security contributions, and where this has been established by a judicial or administrative decision having final and binding effect in accordance with the legal provisions of the country in which it is established or with those of the country of the Acting Procurer.

Furthermore, the Acting Procurer may exclude from participation a tenderer where the Acting Procurer can demonstrate by any appropriate means that the tenderer is in breach of its obligations relating to the payment of taxes or social security contributions.

This paragraph shall no longer apply when the tenderer has fulfilled its obligations by paying or entering into a binding arrangement with a view to paying the taxes or social security contributions due, including, where applicable, any interest accrued or fines.

Grounds of insolvency or professional misconduct

The Acting Procurer may exclude a tenderer in any of the following situations:

- ▶ Where the tenderer is bankrupt or is the subject of insolvency or winding-up proceedings, where its assets are being administered by a liquidator or by the court, where it is in an arrangement with creditors, where its business activities are suspended or it is in any analogous situation arising from a similar procedure under national laws and regulations;
- ▶ Where the Acting Procurer can demonstrate by appropriate means that the tenderer is guilty of grave professional misconduct, which renders its integrity questionable;
- ▶ Where the Acting Procurer has sufficiently plausible indications to conclude that the tenderer has entered into agreements with other economic operators with the intention of distorting competition;
- ▶ Where a conflict of interest cannot be effectively remedied by other less intrusive measures;
- ▶ Where a distortion of competition from the prior involvement of the tenderer in the preparation of this twinning procedure cannot be remedied by other, less intrusive measures;
- ▶ Where the tenderer has shown significant or persistent deficiencies in the performance of a substantive requirement under a prior public contract, a prior contract with a contracting entity or a prior concession contract which led to early termination of that prior contract, damages or other comparable sanctions;
- ▶ Where the tenderer has been guilty of serious misrepresentation in supplying the information required for the verification of the absence of grounds for exclusion or the fulfilment of the selection criteria.

Where the tenderer has undertaken to unduly influence the decision-making process of the Acting Procurer, to obtain confidential information that may confer upon it undue advantages in the procurement procedure, or to negligently provide misleading information that may have a material influence on decisions concerning exclusion, selection or award.

C) Ability to perform the Twinning Activities

This criterion is evaluated on a pass/fail basis. “Fail” means that the evidence given does not provide sufficient indication of the tenderer’s expertise, ability and/or equipment to meet twinning objectives. Any tender that cannot meet the selection criteria requirements will not be selected.

To measure this criterion, tenderers are asked to provide the following information (as part of the twinning tender):

- ▶ Brief description of relevant references and /or previous projects
- ▶ Demonstrate the expertise and working experience required to carry out the twinning by providing short curriculum vitae (CVs) of key personnel and competences necessary to complete the twinning

Note: Tenders may be requested to provide additional information.

D) Compliance with the scope of the twinning call

Tenderers must confirm that the tender complies with the scope of twinning as laid out in this document, more specifically in sections 1.3, 2.1, 2.2, 2.6 and 3.1.

E) Compatibility with other public financing

Tenderers that receive public funding from other sources will be excluded if this leads to double public financing at the time of the twinning’s implementation, or an accumulation of different types of public financing that is not permitted by EU legislation, including EU state aid rules.

F) Compliance with ethics and security requirements

Tenders will be excluded if they:

- ▶ Do not comply with ethical principles (including the highest standards of research integrity, notably as set out in the European Code of Conduct for Research Integrity¹¹, and, in particular, avoiding fabrication, falsification, plagiarism and other research misconduct
- ▶ Include plans to carry out activities that are prohibited in all Member States.

If the tender involves activities that raise ethical concerns, the tenderer must submit an ethics self-assessment that:

- ▶ Describes how the tender meets the legal and ethical requirements of the Member State(s) where the tasks raising ethical issues are to be carried out
- ▶ Explains in detail how the tenderer intends to address the ethical issues identified, in particular as regards:
 - ▶ Objectives (e.g. dealing with vulnerable populations and dual-use goods¹²)
 - ▶ Methodology (e.g. involvement of children and related consent procedure and protection of data collected)

¹¹ The European Code of Conduct for Research Integrity of ALLEA (All European Academies) and ESF (European Science Foundation) of March 2011.

¹² See Article 2(1) EU export control Regulation No 428/2009.

- ▶ The potential impact (e.g. issues relating to the dual use of goods, environmental damage, stigmatisation of particular social groups, political or financial retaliation, benefit-sharing and malevolent use of results).

For information on ethics issues, see the guidance for EU grant beneficiaries [How to complete your ethics self-assessment](#).

3.2 Award criteria

A twinning tender will be evaluated against the award criteria set out here only if the tenderer is not excluded through application of the exclusion criteria, and only if the requirements are met in terms of the selection criteria, the compliance criteria, and the administrative instructions are met.

Table 5 specifies maximum points and thresholds for each of the award criteria.

Table 5. Twinning award criteria

Award criteria	Maximum points	Threshold
Excellence of the proposed twinning		
Extent to which the proposed twinning fits with the twinning definition, scope, expected outputs and relation to the Communication	15	10
Innovativeness from the perspective of the Adopter(s)	5	2
Maturity of solution of the Twinning Originator	5	2
Adequacy of the scale of adoption of the twinning solution and size of the group to which knowledge is to be transferred	15	8
Total for excellence	40	22
Impact of the proposed twinning		
Value of benefits for patients	10	5
Value of benefits for the Adopter(s)' healthcare system(s)	10	5
Feasibility of scaling up	10	5
Sustainability and business case	10	5
Total for impact	40	20
Implementation of the proposed twinning		
Quality and completeness of the work-plan, detail of task and result descriptions, clarity of the description of use of Twinning Personnel, Twinning Direct Costs and Twinning Subcontracting (including fixed costs).	10	5
Feasibility of plan and resources to meet the objectives specified	10	5
Total for implementation	20	10
Overall total score for twinning tender	100	52

Points will be given for each criterion, based on the following assessment table:

Table 6. Award criteria points system

Assessment			Description
5-point criteria	10-point criteria	15-point criteria	
0	0	0	Insufficient (fails to address the criterion under examination or the criterion cannot be judged due to missing or incomplete information)
1	2	3	Poor (the criterion is addressed in an inadequate manner, or there are serious inherent weaknesses)
2	4	6	Fair (while the criterion is broadly addressed, there are some weaknesses to it)
3	6	9	Good (the criterion is addressed well, although improvements would have been highly desirable)
4	8	12	Very good (the criterion is addressed well, although certain improvements are still possible)
5	10	15	Excellent (all relevant aspects of the criterion are successfully addressed; any shortcomings are minor)

3.3 Ranking of twinning tenders

Twinning tenders must score above the thresholds given, for each threshold. Tenders that do not reach the minimum quality thresholds (individual and totals) will be rejected.

The contract will be awarded to the most economically advantageous tender, i.e. the tender scoring above all thresholds and offering the best value for money determined in accordance with the formula below. A weight of 70/30 is given to quality and price, respectively.

Score for tender X	=	Cheapest price / price of tender X	*	100	*	Price weighting (30%)	+	Total quality score (out of 100) for all award criteria of tender x	*	Quality criteria weighting (70%)
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The tender ranked first after applying the formula will be offered a Twinning Contract. Twinning Contracts will then be awarded until the remaining budget is insufficient to fund the next best ranked twinning tender.

Should there be any doubt as to the application of any of these criteria to a tender, tenderers may be requested to provide additional information.

3.4 Evaluation process

This section offers details about how the transparency of the evaluation process will be maintained, how tenders will be opened, and the general process.

Ensuring transparent evaluation

Tenders will be evaluated in a non-discriminatory manner in accordance with the legal requirements provided for in relevant provisions under European regulations.

The Acting Procurer will appoint a Twinning Evaluation Committee (TEC) consisting of experts in the fields related to the twinning topics defined in the request for tenders. In order to ensure fairness and transparency, the appointment of the members of the TEC and its establishment shall take place in good time to meet the deadlines set out for the evaluation of tenders. TEC members will be hired by the Acting Procurer. A Declaration of an absence of conflict of interest

and protection of confidentiality will be signed with each nominated expert. The Acting Procurer will refuse to involve a TEC member for a given tender evaluation if a conflict of interest is identified.

Members of the TEC are appointed in their personal capacity. When carrying out their tasks, they shall not seek or take instructions from the Acting Procurer or from any other body.

Opening of twinning tenders and requests for clarification

The Acting Procurer will open the twinning tender files submitted by email before the deadline and register them. The tender documents are then made available to the TEC members in an online repository. The TEC may request clarifications about the tender documents or additional evidence if needed, in which case the twinning tenderer concerned will be notified by the Acting Procurer by email. The tenderer will have five calendar days (from the day of receipt of the notification) to send the clarifications and / or evidence requested. After this deadline, if no response is received from the tenderer, the offer will be rejected and will be excluded from the tender evaluation. The tenderer will be informed by the Acting Procurer by email.

Evaluation of twinning tenders

The TEC will carry out the selection of twinning tenders; apply the exclusion, compliance and selection criteria; and evaluate tenders that are eligible for evaluation on the basis of the award criteria. Only tenders that satisfy the criteria provided, that are not excluded on the basis of the exclusion criteria, and that meet the selection criteria, are admissible for evaluation under the award criteria. Tenders that do not comply with the formal requirements will be excluded from the tender evaluation.

The TEC will issue its reports on the evaluation. The TEC will reach its decision on final scoring of the tenders by a simple majority vote.

The twinning tenderers will receive a written report via email on the result of the evaluation, including the scoring and their rank.

4 Glossary

Term	Definition
(the) Communication	COM(2018) 233 final, Brussels, 25.04.2018
Request for Twinning Tenders	This document
Twining Activities	See section 1.3
Twining Adopter	The organisation representing a region/city/country or other collection of organisations that will adopt the twinning solution.
Twining Contract	A fixed price contract concluded with a successful tenderer.
Twining Contractor	An organisation which submits a successful tender (“the tenderer”) and which may be a Twining Originator or a Twining Adopter.
Twining Originator	The organisation providing the twinning solution.
Twining Solutions	See section 2.1
Twining Types	See section 2.2