

*EXTRA LIGHT (GA 101034085 - COS-PPOUT-2020-2-03 – EU COSME Programme)*

## **CALL FOR EXPERT: DIGITAL TRAINING ACTIVITIES AND CUSTOMISED ADVISORY SERVICES AND ASSISTANCE FOR BIDDING TO SPECIFIC CALL FOR TENDERS IN THE USA AND CANADA**

To whom it may concern

- Given that Rete di Imprese luce in Veneto (IT), Cluster Lumière (FR) e Cluster d’Il·luminacio de Catalunya CICAT (E) (hereinafter referred as “**Contracting authorities**”) are partners of the project «*EXTRA LIGHT Bolstering European lighting SMEs participation in public procurement extra-EU Project*» co-funded by the EU COSME Programme under the Call for proposals COS-PPOUT-2020-2-03 GA 101034085, aimed at strengthening the collaboration of the European lighting industry clusters across borders and to jointly path the way for SMEs in the public procurement in the extra-EU third countries;
- Given that the above project involves a Consortium of 6 clusters: European Lighting Cluster Alliance (IT) as coordinator; Rete di Imprese Luce in Veneto (IT), Cluster d’Il·luminacio de Catalunya - Cicat (E.), Cluster Lumiere (FR), Business Upper Austria – OO Wirtschaftsagentur GmbH - Biz-Up MHC (A) (hereinafter referred as “**EXTRA LIGHT consortium**”);
- Given that the project includes subcontracting activities for the Digital training for Cluster managers and lighting SMEs» (Task 2.2.1) and Customized advisory services and assistance for bidding to specific call for tenders in the USA and Canada (Task 3.2)

The “Contracting authorities”, on behalf of the “EXTRA LIGHT consortium”, launches a **CALL FOR EXPERTS ON DIGITAL TRAINING ACTIVITIES AND CUSTOMISED ADVISORY SERVICES AND ASSISTANCE FOR BIDDING TO SPECIFIC CALL FOR TENDERS IN THE USA AND CANADA**.

The call includes the following activities:

- A) Digital training for Cluster managers and lighting SMEs
- B) Customized advisory services and assistance for bidding to specific call for tenders in the USA and Canada

The services shall be provided according with the rules and timing described below.

### **BENEFICIAIRES**

The training activities and assistance for bidding shall be provided to cluster managers and SMEs belonging to the “EXTRA LIGHT Consortium”.

### **LANGUAGE**

The activities must be done in **English**.

### **BUDGET AND TERMS OF PAYMENT**

**The maximum budget for the Digital training for Cluster managers and lighting SMEs is 13.500,00 € without VAT.** This budget cannot be surpassed. The budget will be paid: 30% in advance and 70% on balance upon delivery of the final document. The payment will be split equally among the Contracting authorities: Rete di Imprese luce in Veneto (IT), Cluster Lumière (FR) e Cluster d’Il·luminacio de Catalunya CICAT (E).

The maximum budget for the Customized advisory services and assistance for bidding to specific call for tenders in the USA and Canada is 40.000,00 € without VAT. This budget cannot be surpassed. The budget will be paid: 30% in advance, 30% as interim payment and 40% on balance upon delivery of the final document. The payment will be split equally among the Contracting authorities: Rete di Imprese luce in Veneto (IT), Cluster Lumière (FR) e Cluster d’Il·luminació de Catalunya CICAT (E).

## TIMING

The Digital training for Cluster managers and lighting SMEs will be carried out between September 2022 and January 2023. The training activities will be organized for a total of 48 hours. The final calendar will be defined with the provider selected. Any variation will be promptly communicated to the experts:

	USA	Canada
MODULE 1 - Public Procurement in the USA, Canada– general features	8 hours	8 hours
MODULE 2 – Eligibility requirements & assessment criteria	8 hours	8 hours
MODULE 3 – Meet the buyer & Build partnership & Know the competitors	8 hours	8 hours

The Customized advisory services and assistance for bidding to specific call for tenders in the USA and Canada will be carried out between September 2022 and May 2024 of around 140 hours. The final calendar will be defined with the provider selected. Any variation will be promptly communicated to the experts. The legal and technical support provided will be organized in the form of the “one2one assistance” for single companies (or groups of companies) that will jointly apply for a specific bid as a consortium.

	USA	Canada
Minimum number of offers to be submitted under USA/Canada public procurement procedures	4	3

## OWNERSHIP

The contents of the training activities (including slides and documents) can be recorded and made available to:

- all the staff of the 6 clusters of the EXTRA LIGHT Consortium
- the companies belonging to the 6 clusters of the EXTRA LIGHT Consortium.

A dedicated IPR agreement will be signed with the Experts to allow the EXTRA LIGHT Consortium full rights for the internal use of all the materials.

## REQUESTED SERVICES

The Digital training program are structured in the three macro defined modules covering a wide spectrum of the key internationalisation and public procurement topics:

### A - Digital training activities

#### **MODULE 1 Public Procurement in the USA, Canada – general features (16 hours: 8 Usa + 8 Canada)**

- Specific types and features of public procurement in the USA, Canada and of the respective FTA/GPA provisions addressing SMEs access to public tendering
- Information about the different procurement typologies (regarding works, supply, or services) and methods in which the public administrations handle acquisitions, solicitations and contracts – open for foreign companies;
- Who are the main buyers – who manage the public tenders, and how do they process the tenders – what is the tender procedure (online, paper documents, single-stage and/or two-stage procedure);

**MODULE 2 Public Procurement in the USA, Canada – Eligibility requirements & assessment criteria (16 hours: 8 Usa + 8 Canada)**

- Eligibility requirements and specific issues (if any) regarding EU companies access to the national (domestic) tenders;
- Bids evaluation criteria and procedure - what criteria will be used to evaluate bid and assess proposal preparation
- Legal issues, Relevant regulatory requirements, certifications and standards (including ecological label types, packaging and labelling requirements) and IP protection;
- Main barriers for EU (lighting) SMEs to access the public procurement opportunities; main errors and “bad practices”
- 

**MODULE 3 Public Procurement in the USA, Canada – Meet the buyer & Build partnership & Know the competitors (16 hours: 8 Usa + 8 Canada)**

- Importance of bidding conferences and the formal bid openings organised by public buyers, how to attend and how do they work?
- Eligibility aspects requiring partnerships with local companies/consultants etc.
- Outlook and assessment of main competitors participating in target public tenders (i.e., their experience, their cost structure)

**B - Customised advisory service and assistance for bidding to specific call for tenders int the USA and Canada**

The legal and technical support provided by experts in public procurement in the USA and Canada markets will be organised in the form of the “one2one assistance” for single companies (or groups of companies that will jointly apply for a specific bid as a consortium), for a total of around 140 hours.

The assistance will cover the following topics and bidding phases:

- a) Registration to the specific procurement process (and to any additional procurers/suppliers’ registers if requested) and support in contractor tax compliance verification (if requested);
- b) Support in individuating and analysing of the main competitors participating in the selected public tenders (i.e., their experience, their cost structure, their success rate in former bids of the same type, etc.);
- c) Support in analysing the buyer’s requests (expectations) and the related market specifications (lighting market trends and customer needs, local buying customs and behaviours);

d) Preparation and submission of the bid:

- Support in analysing the procurement documents, in particular in clarifying:
  - ✓ how to layout the bid,
  - ✓ how it will be evaluated,
  - ✓ all mandatory and desirable requirements,
  - ✓ the weighting of the areas to be scored (for example, experience or product performance)
- Support in contacting the responsible bids officer for specific queries (requests for clarifications)
- Support in the bid submission phase – indications of how to submit the bid via a specific online submission portal or paper procedure
- Evaluation of the bid:
  - ✓ Support in understanding and preparation of any additional requests of clarifications and/or documents (if envisaged by the tender procedure)

It is mandatory to support the submission of, at least:

- ✓ 4 offers under USA public procurement procedures
- ✓ 3 offers under Canadian public procurement procedures

## SELECTION CRITERIA

The offers must cover both services. The following aspects will be taken into consideration:

### *Digital training for Cluster managers and lighting SMEs*

- CV and reference (40%)
- Methodology (20%)
- Proposed content for Digital services and assistance (20%)
- Economic offers (20%)

### *Customized advisory services and assistance for bidding to specific call for tenders in the USA and Canada*

- CV and reference (40%)
- Methodology (20%)
- Proposed content for Digital services and assistance (20%)
- Economic offers (20%)

Each criterion will receive a score from 1 to 5. The total score will be calculated as a weighted average based on the above percentage of incidence.

The score will be assigned separately for the two types of service. The Contracting authorities reserve the right to separately assign the execution of the two activities A) training and B) advisory covered by the Call.

## SUBMISSION OF OFFERS

The deadline for submitting your offer including all requested documents ends on: **June 30<sup>th</sup> 2022**. Incomplete offers or those submitted after this date cannot be considered. By **July 15<sup>th</sup> 2022** bidders will be informed in a written form about the results of this Call for experts.

All the applicants are asked to contact the Contracting authorities on the [info@extralightproject.eu](mailto:info@extralightproject.eu) address in order to receive the **Application pack** including all the necessary information and application templates

1. APPLICATION FORM
2. DECLARATION OF HONOUR

All offer documents must be delivered electronically to: [info@extralightproject.eu](mailto:info@extralightproject.eu)

## CONTACTS

For any questions regarding the requested documents or the tender process, please contact the Contracting authorities on the [info@extralightproject.eu](mailto:info@extralightproject.eu) address.