

Request for Tenders Launched by the Consortium of European Taxonomic Facilities (CETAF)

In the context of EU-funded project TETTRIX



**TETTRIX:
TETTRIX's neXt level for the taxonomy of
tomorrow**

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A. General Provisions

1. Object, nature and awarding method of the contract

1.1 Context and aim of the request to tender

The Consortium of European Taxonomic Facilities (CETAF) is a European network of Natural History Museums, Botanic Gardens and Research Centres with their associated natural science collections and research expertise. It aims to promote training, research collaborations and understanding in taxonomy and systematic biology, as well as to facilitate access to natural heritage by sharing information derived from collections. The CETAF network comprises major taxonomic institutions from across Europe. Their collections contain a wide range of specimens, including animals, plants, fungi and rocks, as well as genetic resources, which are used for scientific research, education and public engagement. Collectively, these collections represent a major resource for scientific research and for advancing knowledge and understanding of biodiversity. CETAF jointly gathers over 1.5 Billion specimens distributed across more than 80 research institutions in 28 European countries.

CETAF member institutions are committed to the preservation and promotion of this rich heritage through scientific research, training, public outreach and the provision of access to biodiversity data. Through collaboration among its members, CETAF contributes to the development of best practices, guidelines and common protocols in taxonomy, collections management, data sharing and research. The CETAF network also provides an important platform for cooperation between researchers, scientific institutions, professionals and other stakeholders working to address biodiversity-related challenges.

CETAF is directly involved in a large number of EU-funded projects, both as a partner and as coordinator. This is the case for the initiative entitled **TETTRIX – TETTRIs neXt level for the taxonomy of tomorrow**, for which CETAF acts as Coordinator. TETTRIX is funded under Horizon Europe (through a Grant Agreement nr 101286598, the “**TETTRIX GA**”) and aims to strengthen taxonomic approaches for biodiversity by developing, validating and scaling innovative tools, workflows, services and learning pathways, while addressing critical knowledge and capacity gaps across Europe.

TETTRIX will bring together expertise and resources from across the European taxonomic community to strengthen the capacity to identify, monitor and assess biodiversity, with particular attention to priority areas and knowledge gaps including dark taxa, climate-indicator species, freshwater and marine biodiversity, invasive alien species, and citizen science methodologies. The project will combine the development of innovative approaches within the TETTRIX Consortium with their testing, validation and wider uptake through engagement with stakeholders beyond the Consortium.

To support their objectives, TETTRIX will implement a **Financial Support to Third Parties (FSTP)** mechanism through a cascade funding scheme with a total envelope of up to **EUR 2.4 million**. The mechanism will support external organisations and entities, referred to as **Satellite Projects** or **Satellites**, in implementing initiatives that contribute to the objectives and expected results of TETTRIX.

The FSTP mechanism will be implemented through two calls (the “**Calls**”) for proposals:

- **Call 1 – Upgrade of Taxonomic Capacity**, which will support initiatives aimed at testing and validating taxonomic tools, services and methods, including activities addressing dark taxa, dark geographical regions, climate-indicator species, soil/freshwater/marine biodiversity, invasive alien species, citizen science methodologies and the piloting of the Taxonomists4Future initiative. Projects under this call may receive financial support of up to **EUR 100,000** and may have a duration of up to 18 months.
- **Call 2 – Enlargement of Taxonomic Capacity**, which will support courses and learning paths designed to expand taxonomic capacity across Europe, including activities addressing the same or closely related priority areas as those spotted in Call 1. Projects under this call are expected to receive financial support of up to **EUR 60,000** and may have a duration of up to 12 months.

Overall, TETTRIX foresees supporting between approximately 19 and 37 Satellite Projects, depending on the number and quality of proposals received and the final allocation of the available funding among the defined Topics. The final number of supported projects and the amounts awarded will therefore depend on the outcome of the Calls and the applicable selection and budget allocation decisions.

The FSTP mechanism has several complementary objectives. It will enable TETTRIX to validate the tools, workflows, services and approaches developed within the project in diverse real-world contexts; strengthen taxonomic capacity and learning resources in priority areas; address knowledge gaps that cannot be fully covered by the TETTRIX Consortium alone; and engage a wider range of stakeholders in the European taxonomic and biodiversity community. Through the Satellites, TETTRIX will also promote knowledge exchange and transfer, community building, geographical coverage and the integration of local and specialised expertise into wider European taxonomic infrastructures, networks and activities.

In order to ensure the transparent, efficient and effective implementation of this FSTP mechanism, CETAF intends to subcontract an experienced external service provider (the “**Administrator**”) to support the management and operation of the entire cascade funding process.

The Administrator will be involved throughout the different phases of the FSTP mechanism and will provide services including, but not limited to:

- Supporting and contributing to the definition and final drafting of the Calls for proposals together with their supporting documentation;
- supporting the promotion and dissemination of the Calls and contributing to broad stakeholder outreach;
- Establishing an e-system with an online platform (integrated into the TETTRIX website) for the submission, evaluation, and awarding of proposals, as well as for the follow-up, tracking and reporting of the granted Satellites;
- establishing and implementing the procedures and tools required for the eligibility, evaluation and selection of proposals integrated into the Cascade Grants Framework (the “**Framework**”);
- supporting the evaluation process in cooperation with the Community Implementation Committee (CIC) and the relevant TETTRIX governance and management structures;

- supporting the preparation and ensuring the execution of the grant agreements between CETAF and the selected third parties;
- establishing and operating appropriate mechanisms for the technical and financial monitoring of the Satellite Projects;
- supporting the management and monitoring of the implementation of the Satellites Projects, including milestones, deliverables, risks, performance indicators and financial progress;
- designing and maintaining appropriate reporting templates and procedures and collecting and supporting the review of interim and final reports from the Satellites;
- facilitating regular communication and information exchange between the Satellites, CETAF (as TETTRIX Coordinator, the “**Coordinator**”), the Project Coordination Team (**PCT**), the relevant TETTRIX Call Leaders, Consultants, the Community Implementation Committee (**CIC**) and other TETTRIX stakeholders;
- supporting the dissemination and exploitation of the results generated by the Satellites, including their publication through dedicated webpages and other appropriate communication channels; and
- preparing a comprehensive final **Master Report** consolidating the implementation, results, outcomes, impact and lessons learned from the Satellite projects and feeding into the wider reporting and impact assessment of TETTRIX as well as the individual Impact Statements (D10.3 produced by PENSOFT) of the Satellites.

The Administrator will perform these tasks in close cooperation with CETAF, which as TETTRIX Coordinator, will remain responsible for the overall coordination of the FSTP mechanism and for the final decisions falling within the remit of the TETTRIX Coordinator, the PCT and its governance structures. The Administrator will provide the necessary administrative, managerial, monitoring, reporting and communication support, while the scientific and technical alignment of the Satellite projects with TETTRIX will also be supported by the designated TETTRIX Call Leaders, Consultants and relevant project bodies.

A more detailed description of the services to be provided by the Administrator throughout the implementation of the FSTP mechanism is provided in Section B, “**Technical Provisions**”.

1.7 Nature of the Contract

This Contract is a **contract of services**.

The purpose of the Contract is to provide CETAF with the administrative, managerial, monitoring, reporting and communication services required for the implementation of the TETTRIX Financial Support to Third Parties (FSTP) mechanism, including the preparation and launch of the Calls for proposals, support to the evaluation and selection of proposals, support to the contracting of selected third parties, monitoring and reporting of the Satellite Projects, and consolidation and dissemination of their results.

The financial support of up to **EUR 2.4 million** to be awarded to third parties under the TETTRIX FSTP mechanism does **not** form part of the remuneration of the Administrator and is not included in the price of this Contract. The funds allocated to the Satellite Projects will be managed and awarded by CETAF in accordance with the applicable Horizon Europe

rules, the TETTRIX GA and the contractual arrangements established with the selected third parties.

The Administrator shall provide the services described in this **Request for Tender** and shall support CETAF in ensuring the efficient, transparent and timely implementation of the FSTP mechanism. The Administrator shall not acquire any ownership or entitlement to the funds allocated to the Satellite Projects and shall not have the authority to make final decisions concerning the award, modification or termination of financial support, unless expressly authorised by CETAF in writing.

1.8 Method of award of the Contract

The Contract is awarded by means of a negotiated procedure without prior publication in the sense of Article 42 of the Belgian Act on public procurement of 17 June 2016.

CETAF will publish the present Request for Tender on its website, the TETTRIX website and, where appropriate, through the communication channels of the CETAF community and the TETTRIX partners. Additionally, CETAF may contact economic operators with relevant experience in the administration, monitoring and management of EU-funded projects and/or Financial Support to Third Parties mechanisms, to ensure that they are aware of the present award procedure and are invited to submit a tender. All interested economic operators shall be able to submit a tender, regardless of whether they were explicitly invited to do so by CETAF.

This Contract will be awarded to the tenderer that offers the **Best Value for Money**, in accordance with the award criteria defined in Clause 13 below.

When CETAF receives the tenders before the deadline defined in Clause 4 below, it may either:

- designate the tenderer whose tender offers the Best Value for Money and subsequently award the Contract to this tenderer; or
- start negotiations with one or more tenderers, with a view to optimising their respective tenders, in particular with regard to the overall price-quality ratio and the requirements of the Contract. The negotiations may take place orally, during a negotiation meeting, or in writing.

CETAF may, at any stage of the negotiation, request tenderers to provide clarifications, explanations, additional information or further details concerning their tender or any aspect thereof, where considered necessary to assess or clarify the submitted offer. Tenderers shall provide the requested information in full compliance with the requirements specified in the respective request, including, where applicable, the **deadline, format, scope and method of submission**. The Contracting Party shall determine these requirements on a case-by-case basis and communicate them to the tenderer as part of the clarification request.

After the conclusion of the negotiations, the remaining admitted tenderers may be invited to submit a **best and final offer ("BAFO")**. CETAF will designate the tenderer whose BAFO offers the Best Value for Money and will subsequently award the Contract to this tenderer.

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CETAF reserves the right not to award the Contract if none of the tenders offers an adequate level of quality, expertise, compliance or value for money, or if the procurement procedure cannot be concluded under the applicable rules.

2. Contracting Party

The Contracting Party is CETAF AISBL ("CETAF"), Rue Vautier 29, 1000 Brussels, Belgium, referred to as "the Contracting Party" here onwards.

For the purpose of this Request for Tender, CETAF is represented by its Executive Director, Ana Casino (E-mail: ana.casino@cetaf.org cc : acasino@naturalsciences.be).

3. Execution time of the Contract

The Contract starts on the date of its signature and lasts until the moment when the Contract is fully executed. The performance of the services provided for in the present Request for Tender must, in all cases, be completed within the stipulated period and in accordance with the implementation timetable of the TETRIX project and the specific timeframes established for the two Calls for FSTP.

The Contract is expected to cover the entire FSTP mechanism, from the preparation and launch of the Calls for proposals through the implementation, monitoring, reporting, conclusion and consolidation of the results of the Satellite projects.

The Contract will consist of the following indicative phases:

Phase	Identification	Deadline
1	Definition and launch of the calls for Satellites' proposals	
	Call 1	October 2027
	Call 2	April 2028
2	Deadline for submission	
	Call 1	January 2028
	Call 2	June 2028
3	Evaluation of received proposals	
	Call 1	April 2028
	Call 2	July 2028
4	Selection and contracting of awarded Satellite projects	
	Call 1	June 2028
	Call 2	September 2028
5	Implementation and monitoring of Satellite projects	
	Call 1	January 2030
	Call 2	October 2029
6	Contributions to the Impact Statement	
	Call 1	June 2030
	Call 2	October 2029
7	Conclusion, compilation and dissemination of results, including delivery of the Master Report	
	Draft	April 2030
	Final version	May 2030

The two Calls for proposals will have different implementation periods. Satellite Projects selected under **Call 1 – Upgrade of Taxonomic Capacity** may have a duration of up to 18 months, while Satellite projects selected under **Call 2 – Enlargement of Taxonomic Capacity** may have a duration of up to 12 months.

The workload of the Administrator may therefore be unevenly distributed throughout the Contract, depending on the timing of the Calls, the number of proposals received and selected, the duration and implementation schedules of the Satellite Projects, and the timing of their reporting and finalisation.

The exact deadlines for the different activities and outcomes will be established by the Contracting Party in accordance with the TETTRIX GA, the approved Satellites work plan and the implementation requirements of the FSTP mechanism. The Contracting Party reserves the right, where necessary and in accordance with the Contract, to modify the abovementioned indicative timetable and to add, merge or omit phases or activities in response to changes in the TETTRIX Project or the implementation of the FSTP mechanism.

4. Submission of tenders

The tenders have to be submitted by email to the Contracting Party, using the email addresses indicated in Clause 2 above. Each tenderer may submit only one tender.

A group of economic operators may submit a tender jointly. In this case, the economic operators must designate the person who will represent the group before the Contracting Party and provide the relevant authorisation or power of attorney.

Tenders must reach the Contracting Party by **04/10/2026 at 18:00 CET/CEST**. Tenders received after the deadline will not be considered.

The tenderer is responsible for ensuring that the tender is received by the Contracting Party before the applicable deadline. The Contracting Party shall not be responsible for delays or failures in the transmission or receipt of tenders resulting from technical problems, incorrect email addresses or other circumstances attributable to the tenderer.

5. Legislation

The award and the execution of the Contract are subject to the applicable Belgian law, including, where applicable:

- the Belgian Act on public procurement of 17 June 2016;
- the Royal Decree of 18 April 2017 on the placement of public contracts in the classic sectors;
- the Royal Decree of 14 January 2013 establishing the general rules for the execution of public contracts; and
- applicable European and Belgian environmental, social and labour legislation.

The Administrator shall also comply with all applicable European Union legislation, rules and requirements relevant to the performance of the services, including those arising from the **Horizon Europe Programme** and the **TETTRIX GA**, insofar as they concern the implementation and administration of the Financial Support to Third Parties (FSTP) mechanism.

In particular, the Administrator shall perform the Contract in a manner that enables the Contracting Party, as TETTRIX Coordinator, to comply with the applicable requirements concerning the eligibility, selection, award, monitoring, reporting, financial management, transparency, prevention of conflicts of interest, avoidance of double funding, protection of personal data, confidentiality, ethics, and dissemination and exploitation of results relating to the FSTP mechanism.

The Administrator shall remain informed of, and comply with, any applicable amendments, implementing provisions, guidance or instructions issued by the competent European or Belgian authorities during the execution of the Contract, insofar as these affect the services to be provided.

Every tenderer is deemed to be familiar with the applicable regulatory provisions and, by submitting a tender, undertakes to accept and comply with such provisions.

The tenderer must have all required permissions, licences, insurances, registrations and approvals necessary for the performance of the Contract and for the resources it uses for such purpose.

In case of conflict between the provisions applicable to the procurement and execution of this Contract and the provisions governing the implementation of the TETTRIX FSTP mechanism, the applicable mandatory legal provisions shall prevail. The Administrator shall immediately inform the Contracting Party of any identified conflict, ambiguity or regulatory uncertainty that may affect the proper implementation of the Contract.

6. Contract Documents

The Contract Documents will be the following:

- this Request for Tender, including its Annexes;
- the tender submitted by the tenderer that is designated as Administrator by the Contracting Party, and the BAFO, when applicable
- the Contract signed between the Contracting Party and the designated Administrator; and
- where applicable, any written amendments to the Contract duly agreed and signed by the parties during its execution.

The **TETTRIX GA** and the applicable documentation governing the FSTP mechanism constitute the regulatory and operational framework within which the services under this Contract shall be performed. The Administrator shall take due account of such documents insofar as they are relevant to the services covered by the Contract.

In case of contradictions between the Contract Documents, the following order of precedence shall apply:

1. the applicable mandatory provisions of European Union and Belgian law;
2. the Contract signed between the Contracting Party and the Administrator;
3. this Request for Tender, including its Annexes;
4. any written amendments to the Contract agreed by the parties;
5. the tender submitted by the designated Administrator.

Insofar as the TETTRIX GA or other applicable Horizon Europe requirements impose obligations on the Contracting Party concerning the implementation of the FSTP mechanism, the Administrator shall provide the services in such a manner as to enable the Contracting Party to comply with those obligations.

In the event of any contradiction, ambiguity or inconsistency between the documents referred to above, the Administrator shall promptly inform the Contracting Party and shall not take any action that could affect the rights or obligations of the Contracting Party as TETTRIX Coordinator, the TETTRIX Consortium or the Satellite Projects without the prior written agreement of the Contracting Party.

7. Tender

All terms and conditions stated in the present Request for Tender are to be accepted in writing by the tenderer and fully executed within the timeframe of the Contract.

By submitting a tender, the tenderer confirms that it has examined the requirements of this Request for Tender and has obtained all information necessary to prepare its tender and to perform the Contract.

By submission of the tender, the tenderer shall automatically abandon its general or special terms and conditions, even if they are included in the tender, unless the Contracting Party has expressly accepted such terms and conditions in writing.

The tender shall contain all information and documents requested in this Request for Tender and its Annexes. The tenderer shall ensure that the information provided is complete, accurate and sufficiently detailed to allow the Contracting Party to assess the tender against the applicable selection and award criteria.

7.1 Signatures

The tender must be signed by the person(s) who is (are) duly qualified or authorised to represent and commit the tenderer and to sign the Contract.

In case of submission of a tender by a group of economic operators, a valid signature must be placed either by a qualified or authorised representative for each participant in the group, or by the leader authorised by the other participants with the necessary powers of attorney given by the others (and attached to the tender).

The signatory(ies) shall specify in what capacity they act. If an authorised agent signs the tender pursuant to one or more powers of attorney, they shall clearly specify their capacity as well as the name and role of the person(s) who issued the power(s) of attorney.

7.2 Period of validity

Tenderers shall be bound by their tenders for a period of **90 calendar days**, starting from the day after the deadline for receipt of tenders referred to in Clause 4 above.

During this period, the tenderer may not withdraw or modify its tender, except with the prior written agreement of the Contracting Party.

7.3 Language

The tender and all documents and annexes submitted with the tender shall be drawn up in English.

Supporting documents originally issued in another language may be accompanied by an English translation. The Contracting Party may request clarification or, where necessary, a certified translation of such documents.

7.4 Tender form

The tenderer shall use the tender form attached as **Annex 1 (the "Tender Form")** for the submission of its tender.

The tenderer shall provide all information requested in the Tender Form and in the present Request for Tender. The tender shall clearly indicate any information which is confidential and/or relates to technical or commercial secrets and which the tenderer considers should not be disclosed by the Contracting Party.

The tenderer shall ensure that its proposed price, methodology, team, experience, technical resources and other commitments are consistent with the requirements of this Request for Tender.

8. Official representative

The official representative of the tenderer who will act before the Contracting Party shall be designated and duly notified to the Contracting Party in writing at the signature of the Contract.

The official representative shall be the principal point of contact between the Administrator and the Contracting Party for matters relating to the execution of the Contract.

The official representative may be replaced during the execution of the Contract. Any such replacement shall be notified to the Contracting Party in writing in advance and shall identify the new official representative and their contact details.

9. Subcontractors

In the Tender Form, the tenderer shall indicate which economic operators, if any, it intends to subcontract for the development of the online platform (e-System). The tenderer shall identify all the activities concerned, the proposed subcontractor(s). No other service can be supplied through subcontracting.

Subcontracting activities to economic operators other than those identified in the tender is only permitted with the prior written agreement of the Contracting Party. Any request to introduce or replace a subcontractor shall be submitted sufficiently in advance and shall include all information necessary for the Contracting Party to assess the proposed subcontractor's suitability, experience, capacity and compliance with the applicable requirements.

The Administrator shall remain fully responsible towards the Contracting Party for the proper, timely and complete performance of all obligations under the Contract, including those activities performed by subcontractors. The use of subcontractors shall not limit, transfer or otherwise affect the Administrator's contractual liability towards the Contracting Party.

The Administrator shall ensure that all subcontractors comply with the obligations applicable to the services they perform, including, where relevant, obligations relating to confidentiality, protection of personal data, conflicts of interest, ethics, intellectual property, information security and compliance with the applicable requirements governing the TETTRIX FSTP mechanism.

The Administrator shall ensure that subcontractors involved in the evaluation, monitoring, reporting or other sensitive activities relating to the Satellite Projects have no actual or potential conflict of interest with the TETTRIX Project, the TETTRIX Consortium, the Contracting Party, the applicants or the selected Satellite Projects. Where such a conflict of interest arises or is identified, the Administrator shall immediately inform the Contracting Party and take the necessary measures, subject to the Contracting Party's prior agreement where appropriate.

Under no circumstances shall the Administrator subcontract the entirety of its obligations under the Contract or transfer to a subcontractor the overall responsibility for the management and coordination of the services covered by the Contract.

The Contracting Party reserves the right to require the replacement of a subcontractor where there are justified concerns regarding its competence, independence, confidentiality, conflict of interest, compliance or ability to perform the relevant activities properly. Any such replacement shall be carried out without prejudice to the Administrator's obligations and liabilities under the Contract.

10. Reporting duties throughout the execution of the Contract

Unless otherwise specified in the present Request for Tender or subsequently agreed with the Contracting Party, the Administrator shall regularly report to the Contracting Party on the performance of the services, the progress of the FSTP mechanism and the outcomes achieved.

The Administrator shall establish and maintain appropriate reporting and monitoring procedures, also online in the TETTRIX website dedicated to Satellites, throughout the execution of the Contract, enabling the Contracting Party to have a clear and up-to-date overview of the implementation of the FSTP mechanism, both for each individual Satellite Project and for the portfolio of Satellite Projects as a whole.

The Administrator shall, in particular, provide regular information on:

- the progress of the preparation, launch and implementation of the Calls for proposals;
- the number and status of proposals received and their processing;
- the progress of eligibility, evaluation and selection procedures;
- the status of contracting with selected third parties;

- the implementation status of the Satellite Projects, including milestones, deliverables, activities and expected outcomes;
- technical and financial progress, including the use of the financial support allocated to the Satellite projects;
- identified risks, issues, delays, deviations or other circumstances that may affect the implementation of the Satellite projects, together with proposed mitigation or corrective measures;
- relevant performance indicators and aggregated results across the Satellite portfolio;
- compliance-related matters, including conflicts of interest, ethics, data protection and other applicable requirements;
- dissemination and exploitation activities and the visibility of Satellites' results; and
- any other matter that may materially affect the proper, timely and efficient implementation of the FSTP mechanism.

The Administrator shall prepare and maintain the templates, procedures and tools necessary for the collection, consolidation and analysis of the information reported by the Satellite Projects. In particular, the Administrator shall design the technical and financial reporting templates to be used by the selected third parties and shall provide them with the necessary instructions and support for their completion.

The Administrator shall collect and perform an initial review of the reports submitted by the Satellite Projects and shall identify, document and communicate to the Contracting Party any significant inconsistencies, omissions, risks, delays or other issues identified during the review. The Administrator shall also facilitate the subsequent review by the relevant TETTRIX Consultants and the Contracting Party, as applicable. Final approval of Satellites reports shall remain the responsibility of the Contracting Party and the relevant TETTRIX governance structures, as applicable.

Unless otherwise agreed with the Contracting Party, the Administrator shall organise and participate in regular coordination meetings with the Contracting Party, at least once per month during periods of active implementation of the FSTP mechanism. Such meetings may take place virtually. The Administrator shall prepare the necessary information and supporting materials for these meetings and shall keep appropriate records of relevant decisions, actions and follow-up items.

The Administrator shall promptly inform the Contracting Party of any issue that may have a significant impact on the implementation of the Contract or the FSTP mechanism, including significant delays, financial or technical risks, suspected irregularities, conflicts of interest, data protection incidents, non-compliance by a Satellite project or circumstances that could affect the achievement of the objectives of both, the Satellite Project and TETTRIX.

The Contracting Party may require the Administrator to provide additional, ad hoc or specific reports whenever reasonably necessary to ensure the proper management, monitoring and quality of the Contract or to comply with reporting requirements applicable to the TETTRIX project.

At the conclusion of the FSTP mechanism, the Administrator shall consolidate the

information and documentation generated throughout the implementation of the Satellite Projects and shall use it as the basis for the preparation of the comprehensive Master Report referred to in Section B of this Request for Tender.

All reports and records produced by the Administrator under the Contract shall be sufficiently clear, accurate, complete and traceable to enable CETAF to monitor the implementation of the FSTP mechanism and, where necessary, demonstrate compliance with the applicable requirements of the TETTRIX GA and Horizon Europe.

11. Price

This Contract is a contract against a global price (art. 2, 3° of the Royal Decree of 18 April 2017).

The maximum total price for the execution of the Contract (the "Price") is **190,000.00 EUR** (One Hundred Ninety Thousands Euros), including all possible costs and charges relating to the execution of the Contract, as well as the value added tax (VAT).

The tenderer shall include in its tender the price offered to implement the Contract that shall never exceed the Price. It shall be expressed in EURO € and shall constitute the total consideration payable for the execution of the Contract.

The Price cannot be adjusted during the execution of the Contract (art. 38/7 of the Royal Decree of 14 January 2013).

12. Grounds for exclusion

The Contract can only be awarded to a tenderer who is not excluded from participating to public procurement procedures because a compulsory ground for exclusion applies to them. When the tenderer is a group of economic operators, the Contract cannot be awarded to this tenderer if a compulsory ground for exclusion applies to any of the members of that group. By submitting a tender, the tenderer declares (on honour) that none of the exclusion grounds listed below apply to them.

The compulsory grounds for exclusion listed in art. 67 of the Belgian act on public procurement are the following:

1. participation in a criminal organization;
2. bribery;
3. fraud;
4. terrorist offenses or offenses related to terrorist activities or inciting, aiding and abetting or attempting to commit such a crime or offense;
5. money laundering or terrorist financing;
6. child labour and other forms of human trafficking;
7. employment of third-country nationals residing illegally in the country.

The exclusions from participation in public procurement referred to in 1° to 6° apply for a period of five years from the date of conviction. The exclusion from participation in public contracts referred to in 7° shall apply for a period of 5 years from the date of termination of the violation.

A tenderer to whom one or more of the abovementioned grounds for exclusion apply, may prove that he has taken corrective measures which show his reliability (art. 70 of the Belgian Act on public procurement).

The tenderer who has not fulfilled his obligations regarding payment of his tax debts and social security contributions shall, in principle, be excluded from this procurement procedure. Access to the procedure shall not be denied to the tenderer who: (a) has no contribution debt exceeding 3,000 euros; or (b) who has obtained a moratorium for that debt and strictly observes its repayments. Furthermore, the tenderer has the possibility to (i) prove that he holds one or more claims against a contracting authority or a public company that are certain, due and free from any obligation to third parties for an amount at least equal to his debt less 3,000 euros or (ii) to pay off the debts (art. 68 of the Belgian Act on public procurement).

The Contracting Party will examine the accuracy of the implicit statement on honour regarding the exclusion grounds with regard to the tenderer to whom it intends to award the Contract (i.e. the tenderer whose tender offers the best value for money). To this end, it will ask the tenderer in question to provide the required documents.

13. Regularity of tenders

The tenders will be examined in terms of their regularity. Substantially irregular tenders will be rejected.

14. Award criteria

The tenders will be assessed following the principle of the Best Value for Money. In this regard, the Contracting Party will apply the following (weighted) award criteria:

Criterion	Weight (in %)
1. Price	20
2. Experience	20
3. Technical merit	20
4. Service content	20
5. Expertise and added value	20
TOTAL	100

The evaluation of award criteria will be done as follows:

Price: the evaluation of tenders under the award criterion of price is based on the total price, including VAT and all other taxes and costs. It shall cover all types of costs incurred during the duration of the Contract.

Experience: Previous experience of the tenderer will be assessed in relation to the fields of expertise required to achieve the intended outcomes of the Contract. Recent experience over the last 5 years in the fields highly significant to the Contract (such as support to EU Funded projects, assessment and monitoring processes for the implementation of projects) will be described. The tender will include references to the scale of past projects (including name, scope, budget, duration, partnership, public or private entities for which they were

intended) and the role undertaken within those projects. Impact and relevance of the past projects to the tender should be clearly identified and reasoned. Each reference needs to be accompanied by contact information of the client for which the tenderer completed the project in question (who can be contacted by the Contracting Party in order to verify the information provided by the tenderer).

Technical merit: The tenderer must have the technical and technological means (including but not limited to software, analytical and monitoring tools and adequate performance equipment) to properly execute the Contract. The tenderer describes which equipment, technical and technological means, including facilities, software programs, quality systems, project management tools, ethics surveyance (incl. GDPR, AI, IPR) mechanisms, will be used throughout the execution of the Contract. Throughout this description, the tenderer shall refer to his experience with the use of these means during earlier, similar projects, with special attention for the quality standards required, target performance levels, time and financial accomplishment, risks and variations suffered, and final satisfaction of previous clients, with potential indicators of capacity assurance.

Service content: The tenderer shall describe their offer with regard to the services that are required to execute the Contract and the way in which they will deliver all expected outcomes on time, with the quality required and within budget. The tenderer must demonstrate their capability to bring the Contract to a satisfactory conclusion by describing the methodology for implementation, enabling programs, assessment procedures and protocols, reporting means, risks detection and mitigation, ethics compliance and ensuring mechanisms for adequate performance.

Expertise and added value: The tenderer must have sufficient competent personnel to properly perform the Contract and justify the added value to the Contract performance by the proposed project team, including their technical, technological and management skills. To that end, their names, diplomas held, professional qualifications and experience, function, expertise, and resumes will be provided. Furthermore, their individual contribution to the performance of the Contract, their roles and accountability shall be clearly explained and documented.

The tenderer attaches all the documents to their tender that allow the Contracting Party to evaluate the tender in light of the award criteria (e.g. description of references, CVs, etc.).
The number of A4-pages in the tender that are relevant for the assessment in light of the award criteria, should not exceed 30.

15. Bail

No bond is required for the tender submission or the performance of the Contract.

15.1. Administrator's liability

15.1.1. General liability of the Administrator

The Administrator shall bear full liability for errors, omissions and negligence in the

services rendered. The Administrator shall also indemnify the Contracting Party against any compensation owed by it to third parties on account of the delay in the performance of the services or on account of any hired subcontractors' default.

15.1.2. Special obligations for the Administrator

The Administrator and its employees are bound by duty of discretion regarding information of which they become aware in the performance of the Contract. Under no circumstances can the information be disclosed to third parties without the written consent of the Contracting Party. The Administrator may, however, give this Contract as a reference.

The Administrator undertakes, except in cases of force majeure, to have the Contract performed by the persons specified in the tender. The persons listed, or their substitutes, are all considered to be effectively participating in the Contract. The substitutes must be approved by the Contracting Party.

15.1.3. Damage to third parties in the performance of the Contract

Under no circumstances shall the Contracting Party be liable for damage to persons or property resulting directly or indirectly from the activities required for the performance of this Contract. The Administrator shall indemnify the Contracting Party against any claim for damages by third parties in this regard.

16. Billing and payment

Payment will be made according to the following schedule:

Invoice No.	Trigger for invoicing / linked Outcome	Amount
1	At the completion of a functional e-System	10%
2	At the signature of the selected Satellite Projects from the 1st Call for Satellite Projects	15%
4	At the signature of the selected Satellite Projects from the 2nd Call for Satellite Projects	15%
6	At the approval of the Interim Reports from the 1st Call for Satellite Projects	10%
7	At the approval of the Interim Reports from the 2nd Call for Satellite Projects	10%
8	At the approval of the Final Reports from the 1st Call for Satellite Projects	10%
9	At the approval of the Final Reports from the 2nd Call for Satellite Projects	10%
10	Upon approval by the Contracting Party of the Final Master Report	20%
Total		100%

The detailed invoices, drawn up in euro and VAT included, must be sent, to the following address:

Consortium of European Taxonomic Facilities, CETAF AISBL
c/o Royal Belgian Institute of Natural Sciences
Rue Vautier 29
1000 Brussels
Attn. Ana CASINO

The Contracting Party, upon approval of the corresponding outcome will proceed on with the due payment within the next 30 days after reception of the Invoice.

17. Result commitment

The Administrator shall provide all the necessary measures, even if it is not explicitly stated in the present Request for Tender, to achieve satisfactory outcomes and to meet the requirements of this Request for Tender. All efforts to accomplish this is part of the job and should be foreseen by the Administrator. Signature of the tender contract will establish a binding commitment from the Administrator to provide satisfactory results.

18. Delay fines

If the Administrator fails to meet the applicable deadlines (see Clause 3 above), delay fines can be imposed in accordance with (art. 154 of) the Royal Decree of 14 January 2013.

19. Protection of personal data and privacy

The Administrator should be aware that the Contracting Party attaches particular importance to the protection of privacy. The Administrator is obliged to comply strictly with the obligations relating to personal data provided for in the Regulation (EU) 2016/679 of 27 April 2016, the General Data Protection Regulation (GDPR), on the protection of natural persons with regard to the processing of personal data and on the free movement of such data. Ethics and inclusion applicable regulations shall also be abided by the Administrator. If the Administrator reasonably believes that additional arrangements should be made to comply with this legislation, the Administrator shall proactively notify the Contracting Party. In any event, the Administrator is required to cooperate in good faith with the Contracting Party to comply at all times with the relevant provisions of this legislation.

20. Insurance

The Administrator generally and specifically the personnel assigned to perform this Contract must be insured to cover his liability for accidents, as well as his civil liability towards third parties in the execution of the Contract.

Within 30 days after the signature of the Contract the Administrator shall show that he has entered this insurance with a certificate proving the sufficient amount of the guaranteed liability for this assignment.

At any time during the execution of the Contract, the Administrator shall submit this certificate within 15 days after receiving the request from the Contracting Party.

21. Confidentiality

The Administrator shall abstain from disclosing any confidential information that is

disclosed by or on behalf of the Contracting Party, without the prior, explicit and written consent of the Contracting Party. The Administrator shall take the necessary measures to prevent the communication of such knowledge of information or documents to third parties (e.g. by enforcing the necessary confidentiality obligations with regard to its staff).

The Administrator who has during the execution of the assignment knowledge of a design or model, know-how, method, or an invention belonging to the Contracting Party or any other beneficiary of the TETTRIX Project, or jointly to the Contracting Party and one or more of those beneficiaries, or jointly to the Contracting Party and the Administrator, shall abstain from any communication on the design or model, the know-how, the method of the invention to a third party, unless those elements are the subject of the assignment.

22. Intellectual property

The Contracting Party obtains the intellectual property created and/or developed in carrying out the assignment.

The Contracting Party will have the right for commercial and non-commercial, including educational use, for all exploitation modes and forms, for the entire duration of the relevant right and for the whole world.

The Administrator must take all measures necessary to safeguard the rights of the Contracting Party and shall, if necessary, at its own expense, comply with the formalities necessary to ensure that these rights can be invoked against third parties. The Administrator shall inform the Contracting Party about affected settlements and the fulfilled formalities.

The Administrator guarantees that the creations that he will realise will not infringe on any third party right or any law.

The Administrator who has not respected the rights of a third party or did not inform the rights to the Contracting Party guarantees every claim, and this without limiting the amount that would allow a third party against the Contracting Party.

All fees which the Administrator may owe to the authors and to the artistic and technical staff required for the execution of the assignment are at his expense.

The Contracting Party may delegate all or part of the acquired rights to third parties under the Contract.

23. Disputes

The Parties shall use their best efforts to resolve amicably any dispute, disagreement or claim arising out of or in connection with the execution of this Contract. In the event of a dispute, the Parties shall first seek to resolve the matter through good-faith discussions and consultation between their respective representatives.

Where the dispute cannot be resolved through such discussions, the Parties may explore appropriate alternative dispute resolution mechanisms with a view to reaching an amicable settlement.

B. Technical Provisions

1. Scope of the services

As was already mentioned in Section A (General Provisions) above, the Administrator will provide a set of services that includes (but is not limited to):

- Provide final drafting of the calls for third-party projects and supporting documentation;
- Ensure transparent and efficient calls for proposals and support the calls announcement;
- Establishing an e-system with an online platform (integrated into the TETTRIX website) for the submission, evaluation, and awarding of proposals, as well as for the follow-up, tracking and reporting of the granted Satellites;
- Establish a monitoring and evaluation process;
- Facilitate the assessment process with the Community Implementation Committee (CIC);
- Support the contracting process between the Contracting Party and third parties;
- Support monitoring and evaluation of the approved Satellite Projects, including drafting the corresponding reports and records;
- Compile and allocate results in the TETTRIX website;
- Deployment of means for the dissemination and exploitation of the approved Satellite Projects' results; and
- Contribute to the Satellites Impact Statements (D10.3 lead by PENSOFT);
- Drafting a comprehensive final report (the "**Master Report**") that will cover all of the activities realized within the context of the Third-Party projects that are implemented under the TETTRIX project.

From the above, a series of outcomes shall be produced and delivered, and several tasks shall be carried out by the Administrator to meet the breadth of the services required by the Contracting Party and subject to this Contract.

All these outcomes expected from the Administrator will be subject to review by the Contracting Party, for which it may look for assessment, support and advice to the Advisory Boards and the Governance Bodies of the TETTRIX Project as well as other TETTRIX partners.

The work to be carried out by the Administrator will follow the phases of the project identified in Clause 3 of Section A. and will include:

- **Drafting documentation:** including the draft of the Calls for Satellite Projects, for which the Administrator will collaborate with the Contracting Party, the TETTRIX Coordinator and other partners. The drafts shall contain specifications

requirements, eligibility criteria and award principles and criteria, and as many other features that the Satellite Projects Calls shall contain to be transparent, competitive, understandable and feasible. The text will be accompanied by a package of supporting documentation.

- **Processes:** the Administrator shall establish a monitoring and evaluation process that allows keeping track of the progress and due performance of the approved Satellite Projects, both timely and with the quality required. The process will thus include KPIs related to the progress achieved, the milestones met, and the expected outcomes produced by each and all of the approved Satellite Projects. Furthermore, the process will track the potential risks that the implementation for the Satellite Projects may encounter and evaluate progressively their respective likelihood and impact on the due progress of the 3PP.

The process shall thus integrate, among others, the following dimensions in relation to the Satellite Projects:

- Project evaluation, including criteria
 - Contractual procedures
 - Progress monitoring
 - Risks prevention and mitigation
 - Process and outcomes assessment
 - Ethics compliance
 - Results dissemination and exploitation
 - Reporting compliance.
- **E-system:** The Administrator will develop an online system through which proposals will be submitted and tracked. Such a tool will be integrated in the TETTRIX website and will incorporate the main features necessary for tracking progress, risks and timely achievements, qualitative and quantitative accomplishments of the Satellite Projects, individually and also jointly as a unified set of actions. For that purpose, pipelines will be implemented to facilitate provision of data and information from the Satellite Projects. Regular reporting and analysis tools will also be integrated in the e-system, to present global state-of-the art of the implementation of the Satellite Projects both, individually and jointly. Dashboards and visual components will be included.
- **Drafting plans:** to identify the planned work of the Administrator itself but also for the description of the Satellite Projects. Within the overarching e-system defined above, the Administrator will structure a model for the definition and featuring of each of the approved Satellite Projects and will compile the necessary supporting documentation to allow understanding of the project including aspects such as partnership, scope, objectives, target audiences, timeframe, budget, work plan and expected outcomes. For each of those Satellite Projects their corresponding relevant information will be uploaded in the TETTRIX website in the specific micro-sites designed for allocating the Satellite Projects.

In addition, the Administrator is expected to draft a motivated dissemination plan for the entire set of Satellite Projects, identifying the main channels for efficient dissemination, suggesting events and means for further exploit the results of the

Satellite Projects, and advising on the right messages to use in social media/web-based tools. The dissemination plan needs to be set in collaboration with WP10 leader (Pensoft), the CETAF Communication team and in compliance with the PEDR (Plan for Exploitation and Dissemination of Results).

- **Drafting reports:** As concluding statements of tasks and work carried out, during the meetings with the Contracting Party, the Administrator will present updated reports, while highlighting detected issues (of any kind), with their corresponding impact on progress, and when possible, suggesting mitigation measures of any potential negative impact on either time and/or quality dimensions of the expected results from each and all the Satellite Projects.
- **Project Monitoring:** The Administrator shall be responsible for the continuous monitoring of the implementation and progress of each Satellite Project, in close coordination with the Contracting Party and the relevant project stakeholders. Monitoring shall cover, as applicable, progress against the agreed objectives, activities, deliverables, milestones and implementation schedule, as well as the identification of any issues, risks or deviations that may affect the timely and/or qualitative achievement of the expected results. Each Satellite Project shall be required to submit an **interim report** midway through its project life and a **final report** upon completion of the project. These reports shall provide a clear overview of the activities carried out, progress achieved against the planned objectives and deliverables, any issues, risks or deviations encountered, their impact on implementation and, where applicable, the mitigation measures undertaken or proposed. In addition to these formal reporting requirements, the Administrator may request **additional monitoring updates, including monthly progress updates (factsheets), where considered necessary**, depending on the specific circumstances, implementation status, identified risks or issues of a Satellite Project. The frequency and format of such additional updates shall be determined in consultation with the Contracting Party and may be adapted to the monitoring needs of the individual project.
- **Master Report:** Additionally to the interim reports, by 1st May 2030 (month 45 of the TETTRIX lifetime) the Administrator will provide the Contracting Party with a final Master Report, that will compile the entire package of information relevant to the Satellite Projects initiative, from the identification and launching of the Calls for proposals until the finalization of the implementation of all approved Satellite Projects and the execution of the Dissemination and Exploitation of results from Satellite Projects. This Master Report will showcase the process carried out, identify major strengths and bottlenecks, underline resulting impact and parameters of success. It needs to serve as a reference that could be replicated in further initiatives that use the mechanism of cascade grants (to fund Satellite Projects) to facilitate knowledge transfer and capacity building. This final outcome shall be submitted for internal review at least one month prior to the due date of delivery, i.e. by month 44 of the TETTRIX lifetime (1st of April 2030).

2. Description of the services and expected outcomes

More specifically, the tasks and outcomes expected under the Contract are detailed below.

Phase 1: Definition and launch of the Calls

The Administrator will support the Contracting Party, as Coordinator of the TETTRIX Project, in the definition, preparation and launch of the two Calls for Financial Support to Third Parties under WP10 (the "Calls"). The Calls will be implemented in accordance with the TETTRIX GA, the approved scope of the FSTP mechanism and the decisions of the TETTRIX governance bodies.

The two Calls have complementary objectives:

- Call 1 – Upgrade of Taxonomic Capacity, aimed at testing and validating taxonomic tools, services, workflows and methods, including activities addressing dark taxa, dark geographical regions, climate-indicator species, soil/freshwater/marine biodiversity, invasive alien species, citizen science methodologies and the Taxonomists4Future initiative; and
- Call 2 – Enlargement of Taxonomic Capacity, aimed at developing and implementing training courses and learning paths that contribute to the expansion of taxonomic capacity across Europe.

During this Phase 1, the Administrator will, in close cooperation with the TETTRIX Coordinator, the Community Implementation Committee (CIC), the Calls Leaders, the relevant Work Package leaders and designated Consultants:

- support the further definition and operationalisation of the Topics and scope of each Call;
- identify and consolidate the requirements, eligibility conditions, evaluation criteria and supporting documentation applicable to each Call;
- prepare and finalise the Call documents and associated templates;
- establish and document the procedures for eligibility checking, evaluation, ranking and selection;
- prepare the administrative and contractual documentation required for the subsequent implementation of the selected Satellite Projects;
- provide and maintain the online submission system (the "e-system") for proposals;
- organise and support the publication and launch of both Calls;
- support targeted dissemination and outreach activities to ensure broad and inclusive participation;
- support the organisation of the foreseen information webinar(s) for potential applicants;
- respond to and/or coordinate responses to questions raised by potential applicants during the Call periods; and
- ensure that the Calls are implemented transparently, consistently and in accordance with the applicable TETTRIX rules and requirements.

Expected outcomes of Phase 1 are:

- Final Call 1 documentation and supporting package;
- Final Call 2 documentation and supporting package;
- Eligibility, evaluation, selection and contracting procedures;
- Proposal submission system;
- Applicant guidance and templates;
- Communication and outreach materials supporting the launch of the Calls;
- Publication and launch of Call 1 and Call 2;

- Organisation and support of the information webinars; and
- Records and documentation of the Call launch and applicant support activities.

In the event that the TETTRIX Consortium decides to relaunch a Call, extend a Call or implement other measures to mitigate insufficient applications or insufficient fundable proposals, the Administrator will provide the corresponding support in accordance with the decisions taken by the TETTRIX Coordinator and the relevant TETTRIX governance bodies.

Phase 2: Evaluation, selection and contracting of Satellite projects

The Administrator will support and coordinate the evaluation and selection process for proposals submitted under both Call 1 and Call 2, in cooperation with the CIC, the TETTRIX Coordinator and the TETTRIX PCT.

The Administrator will act as an independent external party within the Evaluation Committee and will lead the administrative and eligibility assessment of submitted proposals, while supporting the quality assessment and ranking process in accordance with the approved evaluation methodology.

During this Phase 2, the Administrator will:

- receive and register proposals submitted through the online submission system;
- verify the eligibility and admissibility of proposals;
- coordinate the evaluation process with the CIC and other designated evaluators;
- ensure that proposals are assessed against the approved evaluation criteria and scoring methodology;
- coordinate the independent assessment of proposals by the appointed evaluators;
- manage the procedure for resolving significant discrepancies between individual assessments, where applicable;
- consolidate evaluation results and prepare the ranking of proposals;
- prepare the final evaluation and selection documentation;
- support the CIC and TETTRIX Coordinator in determining the proposals to be recommended for funding, taking into account the applicable Topic allocations and available budget;
- support the communication of evaluation and selection results to applicants;
- prepare the documentation required for contracting; and
- support the Contracting Party in the preparation, negotiation and signature of Grant Contracts with the selected applicants.

The Administrator will ensure that the process is conducted in a transparent, traceable and consistent manner, while maintaining appropriate confidentiality and conflict-of-interest safeguards.

Expected outcomes of Phase 2 are:

- Completed eligibility and admissibility checks;
- Individual and consolidated evaluation records;
- Final evaluation and selection report(s) for Call 1 and Call 2;
- Final ranking of proposals;
- List of selected Satellite Projects;
- Documentation supporting the notification of applicants;
- Grant Contract templates and completed contractual documentation; and

- Signed Grant Contracts with the selected Satellite projects, supported by the Administrator.

Phase 3: Implementation, monitoring and management of Satellite projects

Following the signature of the Satellites Contracts, the Administrator will act as the project manager for the funded Satellite Projects, overseeing their implementation and supporting the Contracting Party in ensuring that the projects are delivered in accordance with their approved work plans, budgets, contractual obligations and timelines.

The Administrator will manage and monitor the portfolio of Satellite Projects funded under both Calls. The implementation periods will reflect the nature of each Call: projects under Call 1 may have an implementation period of up to 18 months, while projects under Call 2 may have an implementation period of up to 12 months.

During this Phase, the Administrator will:

- establish and maintain an appropriate project monitoring and management methodology;
- establish and maintain the online mechanisms required for monitoring the implementation of the Satellite Projects;
- establish project-level milestones, deliverables, KPIs and monitoring indicators;
- monitor technical progress, financial implementation, quality, timing, risks and achievement of expected results;
- coordinate regular communication between the Satellite Projects, the Contracting Party, the relevant Call leaders, Consultants and other TETTRIX actors;
- organise and facilitate regular meetings and progress exchanges with the Satellite Projects;
- provide guidance, templates and instructions to the Satellite Projects regarding implementation and reporting requirements;
- monitor compliance with the Satellite Contracts and identify deviations or potential contractual issues;
- identify risks, delays and implementation challenges and propose appropriate mitigation measures;
- monitor the use of the allocated funding and the financial progress of each Satellite Project and of the portfolio as a whole;
- collect, review and consolidate technical and financial information provided by the Satellite Projects;
- coordinate the preparation and submission of interim and/or final reports, as applicable to the duration of each Satellite Project;
- support the review of submitted reports in cooperation with the relevant Consultants and the Contracting Party;
- monitor the integration and alignment of Satellite results with the objectives and outputs of TETTRIX;
- facilitate cross-project learning, cooperation and exchange between Satellite Projects;
- support the participation of relevant Satellite Projects in TETTRIX meetings, workshops and other appropriate activities;
- provide regular progress information to the Contracting Party and the relevant TETTRIX governance bodies; and
- maintain an appropriate audit trail of project implementation, monitoring and

reporting.

The Administrator will work in close coordination with the designated Consultants, who will provide scientific and technical guidance to the Satellite Projects and ensure alignment with the relevant TETTRIX Work Packages and objectives.

Expected outcomes of Phase 3 are:

- Operational project monitoring and management system;
- Individual monitoring framework for each Satellite project;
- Detailed work plans and implementation timelines;
- Project milestones, KPIs and monitoring grids;
- Financial monitoring and assessment framework;
- Risk monitoring, mitigation and escalation procedures;
- Technical and financial reporting templates and systems;
- Regular project progress reports and consolidated portfolio-level reports;
- Records of meetings, communications and monitoring activities;
- Updated implementation and risk registers;
- Recommendations for corrective or improvement measures where required; and
- Evidence of integration and alignment of Satellite results with TETTRIX objectives and outputs.

Phase 4: Conclusion, results consolidation and dissemination

The Administrator will conclude its services by coordinating the finalisation of the Satellite Projects and consolidating their results and achievements into an overarching view of the FSTP mechanism.

During this Phase 4, the Administrator will:

- monitor and support the completion of all funded Satellite Projects;
- collect and review final technical and financial reports and associated outputs;
- coordinate the final assessment and approval process with the Contracting Party and the relevant Consultants;
- verify and consolidate the principal achievements, outputs, results and impacts of the funded projects;
- identify lessons learned, good practices, challenges and recommendations for future initiatives;
- assess the collective contribution of the Satellite Projects to the objectives of TETTRIX;
- consolidate relevant quantitative and qualitative indicators at portfolio level;
- prepare and maintain the final records of the FSTP mechanism;
- support the dissemination of Satellite results through the TETTRIX website and other appropriate communication channels;
- prepare content for news, interviews, videos, publications and other dissemination formats, in cooperation with the relevant TETTRIX partners; and
- prepare the Master Report consolidating the results and outcomes of the Satellite Projects and the overall implementation of the cascade funding mechanism.

The Master Report will provide an overarching assessment of the Satellite portfolio and will constitute a key input to the wider TETTRIX impact assessment (D11.3 to be produced by

CETAF, WP11 Leader) and reporting activities, as well as to the Impact Statements (D10.3 to be produced by Pensoft, WP10 Leader).

Expected outcomes of Phase 4 are:

- Final reports and consolidated records for all Satellite Projects;
- Consolidated portfolio-level assessment of technical, financial and impact results;
- Compilation of results, outputs and achievements of Call 1 and Call 2;
- Lessons learned and recommendations;
- Dissemination and communication materials on the Satellite Projects and their results;
- Updated TETTRIX webpages and/or content relating to the Satellite Projects;
- Consolidated database and documentation of the funded initiatives; and
- Final Master Report on the TETTRIX FSTP mechanism.

Overall expected result:

Through the above services, the Administrator will provide a complete and integrated management and implementation service for the TETTRIX FSTP mechanism, covering both Calls and the full lifecycle of the Satellite Projects, from preparation and launch through evaluation, selection, contracting, implementation, monitoring, reporting, conclusion and dissemination.

The services shall ensure that the €2.4 million foreseen in the FSTP envelope is administered in a transparent, efficient, traceable and results-oriented manner, while maximising the contribution of the funded Satellite projects to the objectives of TETTRIX, including the validation of taxonomic tools and approaches, the strengthening and enlargement of taxonomic capacity, the addressing of priority knowledge gaps, and the integration and uptake of results within the wider TETTRIX Project.

3. Internal governance of the Contract

Workload and Time schedule

Due to the variety of foreseen Satellite Projects (also in relation to their duration), the Administrator's workload may be unevenly distributed over time depending on the different timeframes, scopes, work plans and outcomes of the individual projects, and also on the timing when results from the individual projects will be available.

Collaborators

The Administrator work is to be carried out in collaboration with several actors that need to be directly involved:

- a) Contracting Party (CETAF)
- b) TETTRIX PCT
- c) TETTRIX Community Implementation Committee (CIC)
- d) TETTRIX partners involved in the implementation of the Satellite projects.
- e) Satellite Projects leaders.

In addition, regular collaboration and feedback with scientists participating in TETTRIX and also with Satellite Projects participants (such as citizen scientists, professionals), will be key for ensuring the evaluation and monitoring of the production of timely, high quality,

and impactful outcomes from the Satellite Projects.

The Administrator will report directly to the Contracting Party, on a regular basis, with recurring meetings kept virtually at least every month (see Section A above).

ANNEXES

C. ANNEX 1. Tender Form

1. Tenderer Identification

- ☐ The tender is submitted by a single economic operator.

Name	of	tenderer:
Legal		form:
Registered		address:
Registration/VAT		number:
Country	of	registration:
Website:		
Contact person's details:		
Name:		
Position:		
E-mail:		

- ☐ The tender is submitted jointly by a group of economic operators.

If applicable, please identify all members of the group and indicate the entity designated to represent the group (the "Main Applicant"):

Economic operator	Role in the tender	Contact person
•	•	•
•	•	•
•	•	•

2. Acceptance of the Request for Tender

The undersigned confirms that:

- ☐ it has examined and understood the Request for Tender and its Annexes;
- ☐ it accepts the terms and conditions of the Request for Tender;
- ☐ it accepts the applicable requirements relating to the execution of the Contract;
- ☐ the information provided in this Tender Form and in the accompanying tender documentation is complete and accurate;
- ☐ the tender is valid for **90 calendar days** from the day following the deadline for submission of tenders;
- ☐ it has taken into account all costs necessary for the proper execution of the Contract in its proposed price; and
- ☐ it undertakes to perform the services in accordance with the requirements of the Request for Tender and the Contract.

3. Exclusion Grounds and Eligibility

The undersigned declares on honour that:

- ☐ none of the compulsory exclusion grounds referred to in Clause 12 of the Request for Tender applies to the tenderer;
- ☐ the tenderer has fulfilled its obligations relating to the payment of taxes and social security contributions, subject to the exceptions provided for under the applicable legislation;
- ☐ the tenderer has all permissions, registrations, licences, insurance and other authorisations required for the performance of the Contract; and
- ☐ the tenderer is not subject to any circumstance that would prevent it from properly and independently performing the Contract.

The tenderer undertakes to provide supporting documentation upon request by the Contracting Party.

4. Tenderer's Experience

Please provide a summary of the tenderer's relevant experience, in particular in relation to:

- administration and management of EU-funded projects;
- Financial Support to Third Parties / cascade funding mechanisms;
- calls for proposals and grant schemes;
- evaluation and selection of proposals;
- project monitoring and reporting;
- technical and financial monitoring;
- management of online submission or monitoring systems;
- dissemination and exploitation of project results.

Please provide **up to five relevant references from the last five years**.

Reference	Client / project	Description and relevance	Duration	Budget	Role of tenderer
1	[•]	[•]	[•]	[•]	[•]
2	[•]	[•]	[•]	[•]	[•]
3	[•]	[•]	[•]	[•]	[•]
4	[•]	[•]	[•]	[•]	[•]
5	[•]	[•]	[•]	[•]	[•]

Detailed descriptions of the references may be provided as an attachment.

5. Technical and Service Proposal

The tenderer shall provide a description of its proposed approach for the implementation of the Contract.

The proposal shall, as a minimum, address the following:

5.1 Methodology and approach

Describe the proposed methodology for managing the TETTRIX FSTP mechanism across its full lifecycle, including:

- preparation and launch of the Calls;
- evaluation and selection;
- contracting;
- implementation and monitoring;
- reporting;
- conclusion and consolidation of results;
- dissemination and exploitation.

Tenderer's response:

5.2 Monitoring and reporting

Describe the proposed approach to:

- monitoring individual Satellite Projects;
- monitoring the overall portfolio;
- tracking milestones, deliverables, KPIs and risks;
- technical and financial monitoring;
- interim and final reporting;
- identification of delays and deviations;
- mitigation and corrective measures; and
- escalation of significant issues to the Contracting Party (CETAF).

Tenderer's response:

5.3 E-system and technical solution

Describe the proposed technical solution for the online submission, evaluation, monitoring and reporting system, including its integration with the TETTRIX website.

Please indicate, where applicable:

- main functionalities;
- user management;
- proposal submission and evaluation;
- monitoring dashboards;
- reporting functionality;
- data storage and traceability;
- data protection and security measures;
- maintenance and technical support.

Tenderer's response:

5.4 Risk management and quality assurance

Describe the measures proposed to ensure:

- timely delivery;
- quality assurance;
- risk identification and mitigation;
- continuity of service;
- prevention and management of conflicts of interest;
- GDPR and data protection compliance;
- confidentiality and information security.

Tenderer's response:

5.5 Dissemination and exploitation

Describe the proposed approach to supporting the dissemination and exploitation of Satellite Project results, including the proposed approach to the TETTRIX website, communication materials and other appropriate channels.

Tenderer's response:

6. Proposed Project Team

Please identify the key personnel proposed for the execution of the Contract.

Name	Position / role	Relevant expertise	Years of experience	Main responsibilities
•	•	•	•	•
•	•	•	•	•
•	•	•	•	•

Please attach a **CV for each key team member**, including relevant qualifications, professional experience and previous assignments of relevance to this Contract.

The tenderer shall also indicate the estimated involvement of each key team member throughout the different phases of the Contract.

7. Subcontractors

Please indicate whether the tenderer intends to subcontract any part of the services.

- ☐ No subcontractors are proposed.
- ☐ The following subcontractor(s) are proposed for the development of the e-System:

Subcontractor	Activities to be subcontracted	Relevant experience	Estimated involvement
•	•	•	•

The tenderer confirms that no services other than those permitted under Clause 9 of the Request for Tender will be subcontracted.

8. Financial Offer

The tenderer proposes the following total price for the complete execution of the Contract:

Total price: EUR _____ including VAT

The tenderer confirms that this price:

- does not exceed the maximum Contract price of **EUR 190,000 including VAT**;
- includes all costs, fees, expenses and charges necessary for the execution of the Contract; and
- is offered in accordance with the conditions of the Request for Tender.

Item	Amount excluding VAT	VAT	Amount including VAT
Complete execution of the Contract	EUR _____	EUR _____	EUR _____

If relevant, the tenderer may provide a breakdown of the proposed price.

9. Declaration and Signature

The undersigned, duly authorised to represent the tenderer, hereby confirms that:

- the information contained in this Tender Form and the accompanying documents is true, complete and accurate;
- the tenderer accepts the terms and conditions of the Request for Tender;
- the tenderer undertakes to perform the Contract in accordance with the requirements set out therein;
- the proposed price covers the complete execution of the Contract; and
- the tenderer has disclosed all relevant information concerning its proposed team, subcontractors and any circumstances that may affect its ability to perform the Contract.

Name of tenderer:

Name of authorised signatory:

Position:

Date:

Signature:

10. List of Attachments

The tenderer shall attach, as applicable:

- ☐ Detailed technical/service proposal
- ☐ Relevant project references
- ☐ CVs of proposed key personnel
- ☐ Information concerning proposed e-System/technical solution
- ☐ Subcontractor information
- ☐ Price breakdown, if applicable
- ☐ Powers of attorney / authorisations, where applicable
- ☐ Other supporting documents:
 - ...
 - ...
 - ...
 - ...